



# **AGENDA**

## **Battlefield Fire Protection District Battlefield Volunteer Fire Department**



Regular Board Meeting  
4117 W. Second St., Battlefield, MO 65619

**Tuesday, February 13, 2024  
5:00 PM**

### **Preliminaries to the Meeting**

1. Call to Order
2. Ceremonial Matters
3. Board Member Swear-In
4. Roll Call
5. Establishment of a Quorum
6. Approval of the Meeting's Agenda

### **Approval of Last Month's Minutes**

1. Correction of Minutes
2. Approval of Regular Minutes

### **Financial Business**

1. Payment of the bills
2. Check signing.
3. Financial statements

### **Public Comments**

1. Any comments must be submitted via email to [info@battlefieldfire.com](mailto:info@battlefieldfire.com) prior to 5pm on the Monday prior to meeting.

### **Unfinished Business**

1. Public Hearing – LAGERS change for FY24.

### **New Business**

1. Tony Reahr – Edward Jones
2. Policy Updates
3. Maintenance Facility Project
4. General Overview

### **Closed Session**

1. None

### **Adjournment**

Representatives of the news media may obtain copies of this notice by contacting the Battlefield Fire Protection District.

Posted: 2/9/2024 12:00 AM certified by the undersigned that a true copy of the foregoing agenda was posted at the Battlefield Administration and Training Center in Battlefield, Missouri.

\_\_\_\_\_  
Secretary to the Board of Directors



# **Battlefield Fire Protection District Battlefield Volunteer Fire Department**

## **Minutes**

### **January 2024 Regular Board Meeting**



**Location of Meeting:**

4117 West Second St.  
Battlefield, MO 65619

**Time of Meeting**

5:00 PM

**Date of Meeting:**

January 09, 2024

The meeting of the Battlefield Fire Protection District Board of Directors was called to order by Chairman Trevor Crist at 5 pm. A roll call was taken, and a quorum was established.

Board Members Present: Chairman Trevor Crist, Treasurer Mark Pon and Vice-Chair Danny Perches.

Mr. Perches moved to approve the agenda, 2<sup>nd</sup> by Mr. Pon. Motion carried.

**Approval of Last Month's Minutes:**

1. Approval of Regular Minutes- Mr. Pon moved to approve the December Regular Meeting minutes. 2<sup>nd</sup> by Mr. Perches. Motion carried.

**Financial Business:**

1. The Board addressed bills to be paid and signed checks.
2. Treasurer Mark Pon discussed the December financial report and review of cash assets. Battlefield Volunteer Fire Department's checking account indicates \$5,528.84. Battlefield Fire Protection District's ICS account holds \$2,729,137.80 and Money Market holds \$62,645.29.
3. Chief Moore briefly reviewed line items on the financials and the close out of 2023.
4. Mr. Pon moved to approve the financials 2<sup>nd</sup> by Mr. Perches. Motion carried.

**Public Comments:** None

**Unfinished Business:**

1. Public Hearing-Lagers change to non-contributory for FY24
  - Notice posted 1-03-2024 for 45 days in accordance with Section 105.675 Revised Statutes of Missouri.

**New Business:**

1. Board of Directors appointment
  - Mr. Perches moved to appoint Jen Albers to the Board of Directors seat C. 2<sup>nd</sup> by Mr. Pon. Motion carried.
2. General Overview - Staff provided a review of their monthly reports.

**Closed Session:** None

**Adjournment:**

Mr. Perches moved to adjourn at 5:28pm.

Approved by:

---

Trevor Crist

---

Danny Perches

---

Scott Lambeth

---

Mark Pon

**Battlefield Volunteer Fire Department**  
**Statement of Net Assets**

**As of January 31, 2024**

**Jan 31, 24**

**ASSETS**

**Current Assets**

**Checking/Savings**

1050 · Oakstar Volunteer Account 5,531.06

**Total Checking/Savings** 5,531.06

**Total Current Assets** 5,531.06

**TOTAL ASSETS** **5,531.06**

**LIABILITIES & Revenue**

**Revenue**

1110 · Retained Earnings 5,528.95

**Net Revenue** 2.11

**Total Revenue** 5,531.06

**TOTAL LIABILITIES & Revenue** **5,531.06**

Battlefield Volunteer Fire Department  
Statement of Net Activities  
January 2024

	Jan 24
Ordinary Revenue/Expense	
Revenue	
4140 - Interest Revenue	2.11
Total Revenue	2.11
Net Ordinary Revenue	2.11
Net Revenue	2.11

**Battlefield Fire Protection District**  
**Statement of Activities**  
January 2024

1:13 PM  
02/06/2024  
Cash Basis

	Jan 24	Jan 24
<b>Revenue</b>		
<b>4000 · Revenue</b>		
4005 · Tax Revenue	4,886,848.87	4,886,848.87
4010 · Tax Interest Revenue	2,143.58	2,143.58
4050 · Miscellaneous Revenue	14,026.38	14,026.38
4060 · Interest Revenue	20,157.26	20,157.26
<b>Total 4000 · Revenue</b>	<b>4,923,176.09</b>	<b>4,923,176.09</b>
<b>Total Revenue</b>	<b>4,923,176.09</b>	<b>4,923,176.09</b>
<b>Gross Profit</b>	<b>4,923,176.09</b>	<b>4,923,176.09</b>
<b>Expense</b>		
<b>5000 · Capital Expense</b>		
5015 · Uniforms/PPE/Bunker Gear	100.00	100.00
5020 · Building Lease	9,343.75	9,343.75
5035 · Communications	528.78	528.78
5040 · Firefighting/EMS	187.36	187.36
5055 · Vehicles	594.08	594.08
<b>Total 5000 · Capital Expense</b>	<b>10,753.97</b>	<b>10,753.97</b>
<b>6000 · Communications</b>		
6003 · MDT/Cell Phones	4,152.82	4,152.82
6020 · Managed IT Service	757.50	757.50
<b>Total 6000 · Communications</b>	<b>4,910.32</b>	<b>4,910.32</b>
<b>6100 · Insurance</b>		
6110 · Workman's Compensation	25,196.95	25,196.95
6120 · Medical, Dental, Vision	27,307.42	27,307.42
<b>Total 6100 · Insurance</b>	<b>52,504.37</b>	<b>52,504.37</b>
<b>6200 · Maintenance &amp; Repairs</b>		
6205 · Gas/Diesel	2,950.25	2,950.25
6210 · Apparatus Repair	1,480.78	1,480.78
6215 · Stations & Buildings	2,236.20	2,236.20
6225 · Equipment Maintenance	15.79	15.79
6235 · Headquarters Maintenance	1,209.00	1,209.00
<b>Total 6200 · Maintenance &amp; Repairs</b>	<b>7,892.02</b>	<b>7,892.02</b>
<b>6300 · Office/Stations</b>		
6315 · Accounting Fees	1,400.45	1,400.45
6330 · Subscriptions/Memberships	2,212.60	2,212.60
<b>Total 6300 · Office/Stations</b>	<b>3,613.05</b>	<b>3,613.05</b>
<b>6400 · Training</b>		
6410 · Training Classes	3,125.00	3,125.00
<b>Total 6400 · Training</b>	<b>3,125.00</b>	<b>3,125.00</b>
<b>6500 · Legal</b>		
6525 · Cafeteria Pass Thru	1,539.34	1,539.34

	<b>Jan 24</b>	<b>Jan 24</b>
6535 · Attorney Fees	302.50	302.50
<b>Total 6500 · Legal</b>	<b>1,841.84</b>	<b>1,841.84</b>
<b>6600 · Salaries</b>		
6605 · District Personnel	194,292.24	194,292.24
6610 · Board of Directors		
6612 · Chaplain Expense	64.30	64.30
6610 · Board of Directors - Other	350.00	350.00
<b>Total 6610 · Board of Directors</b>	<b>414.30</b>	<b>414.30</b>
6620 · Employer Payroll Taxes	2,598.79	2,598.79
6625 · Lagers	24,907.13	24,907.13
6635 · Uniforms	135.33	135.33
6640 · 457 Pass Thru	4,050.20	4,050.20
6665 · Special Overtime	654.35	654.35
6668 · Union Dues Passthrough	1,051.62	1,051.62
<b>Total 6600 · Salaries</b>	<b>228,103.96</b>	<b>228,103.96</b>
<b>6700 · Medical</b>		
6710 · Employee Physicals/POET	554.14	554.14
<b>Total 6700 · Medical</b>	<b>554.14</b>	<b>554.14</b>
<b>6750 · Utilities</b>		
6755 · Water	118.74	118.74
6760 · Sanitation	233.07	233.07
6765 · Sewer	172.35	172.35
6770 · Electric/Gas	2,912.43	2,912.43
6775 · Internet/Phones/Cable	1,283.52	1,283.52
<b>Total 6750 · Utilities</b>	<b>4,720.11</b>	<b>4,720.11</b>
<b>6800 · Supplies</b>		
6810 · Public Relations/Outreach	40.00	40.00
6820 · Fire & EMS Expendables	412.14	412.14
6825 · Office Supplies	1,067.61	1,067.61
6830 · Janitorial Supplies	95.40	95.40
6835 · Stations/Buildings Supplies	96.96	96.96
<b>Total 6800 · Supplies</b>	<b>1,712.11</b>	<b>1,712.11</b>
<b>Total Expense</b>	<b>319,730.89</b>	<b>319,730.89</b>
<b>Net Revenue</b>	<b>4,603,445.20</b>	<b>4,603,445.20</b>

**Battlefield Fire Protection District**  
**Statement of Net Assets**  
As of January 31, 2024

1:13 PM

02/06/2024

Cash Basis

Jan 31, 24

**ASSETS**

**Current Assets**

**Checking/Savings**

1000 · OakStar - ICS	7,246,285.45
1005 · OakStar - Money Market	62,897.33
1025 · Oakstar - Operating	102,023.85
1105 · Petty Cash	131.66
1199 · Allowance for Restricted Funds	-1,539,576.00

**Total Checking/Savings** 5,871,762.29

**Total Current Assets** 5,871,762.29

**Fixed Assets**

1505 · Office Equipment 4,213.28

**Total Fixed Assets** 4,213.28

**TOTAL ASSETS** 5,875,975.57

**LIABILITIES & Revenue**

**Revenue**

**3200 · Fund Balances**

3100 · Restricted Fund - Operating	-700,000.00
3120 · Restricted Fund-Emergency Equip	-339,576.00
3140 · Restricted Fund - Bldg Reserve	-500,000.00
3200 · Fund Balances	2,487,239.86

**Total 3200 · Unrestricted Fund Balances** 947,663.86

32000 · Retained Earnings 324,866.51

**Net Revenue** 4,603,445.20

**Total Revenue** 5,875,975.57

**TOTAL LIABILITIES & Revenue** 5,875,975.57



**Battlefield Fire Protection District**  
**Statement of Cash Flows**  
January 2024

1:13 PM

Cash Basis

	Jan 24	Dec 23	% Change
<b>Revenue</b>			
<b>4000 · Revenue</b>			
4005 · Tax Revenue	4,886,848.87	871,333.70	460.85%
4010 · Tax Interest Revenue	2,143.58	1,369.91	56.48%
4050 · Miscellaneous Revenue	14,026.38	110.00	12,651.26%
4060 · Interest Revenue	20,157.26	9,860.78	104.42%
<b>Total 4000 · Revenue</b>	<b>4,923,176.09</b>	<b>882,674.39</b>	<b>457.76%</b>
<b>Total Revenue</b>	<b>4,923,176.09</b>	<b>882,674.39</b>	<b>457.76%</b>
<b>Gross Profit</b>	<b>4,923,176.09</b>	<b>882,674.39</b>	<b>457.76%</b>
<b>Expense</b>			
<b>5000 · Capital Expense</b>			
5015 · Uniforms/PPE/Bunker Gear	100.00	3,200.46	-96.88%
5020 · Building Lease	9,343.75	0.00	100.0%
5035 · Communications	528.78	0.00	100.0%
5040 · Firefighting/EMS	187.36	452.22	-58.57%
5052 · Fitness Equipment	0.00	45.00	-100.0%
5055 · Vehicles	594.08	0.00	100.0%
<b>Total 5000 · Capital Expense</b>	<b>10,753.97</b>	<b>3,697.68</b>	<b>190.83%</b>
<b>6000 · Communications</b>			
6003 · MDT/Cell Phones	4,152.82	4,128.50	0.59%
6020 · Managed IT Service	757.50	757.50	0.0%
<b>Total 6000 · Communications</b>	<b>4,910.32</b>	<b>4,886.00</b>	<b>0.5%</b>
<b>6100 · Insurance</b>			
6110 · Workman's Compensation	25,196.95	0.00	100.0%
6120 · Medical, Dental, Vision	27,307.42	16,178.98	68.78%
<b>Total 6100 · Insurance</b>	<b>52,504.37</b>	<b>16,178.98</b>	<b>224.52%</b>
<b>6200 · Maintenance &amp; Repairs</b>			
6205 · Gas/Diesel	2,950.25	4,998.76	-40.98%
6210 · Apparatus Repair	1,480.78	3,203.23	-53.77%
6215 · Stations & Buildings	2,236.20	784.90	184.9%
6225 · Equipment Maintenance	15.79	450.00	-96.49%
6235 · Headquarters Maintenance	1,209.00	1,250.19	-3.3%
6255 · Maintenance Shop Equipment	0.00	948.30	-100.0%
6275 · Office Equipment	0.00	35.99	-100.0%
<b>Total 6200 · Maintenance &amp; Repairs</b>	<b>7,892.02</b>	<b>11,671.37</b>	<b>-32.38%</b>
<b>6300 · Office/Stations</b>			
6305 · Software Expense	0.00	4,000.00	-100.0%
6315 · Accounting Fees	1,400.45	745.00	87.98%
6330 · Subscriptions/Memberships	2,212.60	1,040.85	112.58%
<b>Total 6300 · Office/Stations</b>	<b>3,613.05</b>	<b>5,785.85</b>	<b>-37.55%</b>
<b>6400 · Training</b>			

	<b>Jan 24</b>	<b>Dec 23</b>	<b>% Change</b>
6410 · Training Classes	3,125.00	3,309.01	-5.56%
6415 · Equipment	0.00	3,965.00	-100.0%
<b>Total 6400 · Training</b>	<b>3,125.00</b>	<b>7,274.01</b>	<b>-57.04%</b>
<b>6500 · Legal</b>			
6525 · Cafeteria Pass Thru	1,539.34	-387.44	497.31%
6535 · Attorney Fees	302.50	0.00	100.0%
<b>Total 6500 · Legal</b>	<b>1,841.84</b>	<b>-387.44</b>	<b>575.39%</b>
<b>6600 · Salaries</b>			
6605 · District Personnel	194,292.24	250,054.01	-22.3%
6610 · Board of Directors			
6612 · Chaplain Expense	64.30	0.00	100.0%
6610 · Board of Directors - Other	350.00	850.00	-58.82%
<b>Total 6610 · Board of Directors</b>	<b>414.30</b>	<b>850.00</b>	<b>-51.26%</b>
6620 · Employer Payroll Taxes	2,598.79	3,464.27	-24.98%
6625 · Lagers	24,907.13	11,975.07	107.99%
6635 · Uniforms	135.33	206.77	-34.55%
6640 · 457 Pass Thru	4,050.20	-4,050.20	200.0%
6655 · Expense Account	0.00	100.83	-100.0%
6665 · Special Overtime	654.35	3,312.30	-80.25%
6668 · Union Dues Passthrough	1,051.62	-1,051.62	200.0%
<b>Total 6600 · Salaries</b>	<b>228,103.96</b>	<b>264,861.43</b>	<b>-13.88%</b>
<b>6700 · Medical</b>			
6710 · Employee Physicals/POET	554.14	20,007.83	-97.23%
<b>Total 6700 · Medical</b>	<b>554.14</b>	<b>20,007.83</b>	<b>-97.23%</b>
<b>6750 · Utilities</b>			
6755 · Water	118.74	119.54	-0.67%
6760 · Sanitation	233.07	707.29	-67.05%
6765 · Sewer	172.35	173.47	-0.65%
6770 · Electric/Gas	2,912.43	2,660.04	9.49%
6775 · Internet/Phones/Cable	1,283.52	1,761.79	-27.15%
<b>Total 6750 · Utilities</b>	<b>4,720.11</b>	<b>5,422.13</b>	<b>-12.95%</b>
<b>6800 · Supplies</b>			
6810 · Public Relations/Outreach	40.00	31,952.63	-99.88%
6820 · Fire & EMS Expendables	412.14	153.22	168.99%
6825 · Office Supplies	1,067.61	0.00	100.0%
6830 · Janitorial Supplies	95.40	471.22	-79.76%
6835 · Stations/Buildings Supplies	96.96	94.05	3.09%
<b>Total 6800 · Supplies</b>	<b>1,712.11</b>	<b>32,671.12</b>	<b>-94.76%</b>
<b>Total Expense</b>	<b>319,730.89</b>	<b>372,068.96</b>	<b>-14.07%</b>
<b>Net Revenue</b>	<b>4,603,445.20</b>	<b>510,605.43</b>	<b>801.57%</b>

**Battlefield Fire Protection District**  
**Profit & Loss Budget Performance**  
Jan 2024

	Annual Budget	Jan 24	% Received	Jan YTD	% Received YTD	Revenue Still Expected	Revenue Over Expected
<b>Revenue</b>							
4000 · Revenue							
4005 · Tax Revenue	6,389,953.00	4,886,848.87	76.48%	4,886,848.87	76.48%	1,503,104.13	0.00
4010 · Tax Revenue Interest	0.00	2,143.58	0.00%	2,143.58	0.00%	0.00	2,143.58
4050 · Miscellaneous Revenue	0.00	14,026.38	0.00%	14,026.38	0.00%	0.00	14,026.38
4060 · Interest Revenue	0.00	20,157.26	0.00%	20,157.26	0.00%	0.00	20,157.26
Total 4000 · Revenue	6,389,953.00	4,923,176.09	77.05%	4,923,176.09	77.05%	1,503,104.13	36,327.22
<b>Expense</b>							
5000 · Capital Expense							
5015 · Uniforms/PPE/Bunker Gear	65,000.00	100.00	0.15%	100.00	0.15%	64,900.00	
5020 · Building Lease	111,450.00	9,343.75	8.38%	9,343.75	8.38%	102,106.25	
5030 · Information Technology	25,000.00	0.00	0.00%	0.00	0.00%	25,000.00	
5035 · Communications	40,000.00	528.78	0.00%	528.78	0.00%	39,471.22	
5040 · Firefighting/EMS	550,000.00	187.36	0.03%	187.36	0.03%	549,812.64	
5052 · Fitness Equipment	5,700.00	0.00	0.00%	0.00	0.00%	5,700.00	
5055 · Vehicles	70,000.00	594.08	0.00%	594.08	0.00%	69,405.92	
Total 5000 · Capital Expense	867,150.00	10,753.97	1.24%	10,753.97	1.24%	856,396.03	
6000 · Communications							
6003 · MDT/Cell Phones	15,000.00	4,152.82	27.69%	4,152.82	27.69%	10,847.18	
6020 · Managed IT Service	16,260.00	757.50	4.66%	757.50	4.66%	15,502.50	
Total 6000 · Communications	31,260.00	4,910.32	15.71%	4,910.32	15.71%	26,349.68	
6100 · Insurance							
6110 · Workman's Compensation	137,203.02	25,196.95	18.36%	25,196.95	18.36%	112,006.07	
6115 · Commercial & Property	115,821.00	0.00	0.00%	0.00	0.00%	115,821.00	
6120 · Medical, Dental, Vision	307,834.00	27,307.42	8.87%	27,307.42	8.87%	280,526.58	
6125 · FFAM Dues	6,000.00	0.00	0.00%	0.00	0.00%	6,000.00	
Total 6100 · Insurance	566,858.02	52,504.37	9.26%	52,504.37	9.26%	514,353.65	

**Battlefield Fire Protection District**  
**Profit & Loss Budget Performance**  
Jan 2024

	Annual Budget	Jan 24	% Received	Jan YTD	% Received YTD	Revenue Still Expected	Revenue Over Expected
<b>6200 · Maintenance &amp; Repairs</b>							
6205 · Gas/Diesel	52,000.00	2,950.25	5.67%	2,950.25	5.67%	49,049.75	
6210 · Apparatus Repair	50,000.00	1,480.78	2.96%	1,480.78	2.96%	48,519.22	
6215 · Stations & Buildings	55,000.00	2,236.20	4.07%	2,236.20	4.07%	52,763.80	
6220 · Lawn Maintenance	10,500.00	0.00	0.00%	0.00	0.00%	10,500.00	
6225 · Equipment Maintenance	7,000.00	15.79	0.23%	15.79	0.23%	6,984.21	
6235 · Headquarters Maintenance	15,000.00	1,209.00	8.06%	1,209.00	8.06%	13,791.00	
6250 · Ground/Aerial Ladder Testing	2,000.00	0.00	0.00%	0.00	0.00%	2,000.00	
6255 · Maintenance Shop Equipment	1,750.00	0.00	0.00%	0.00	0.00%	1,750.00	
6280 · SCBA Flow Testing	5,000.00	0.00	0.00%	0.00	0.00%	5,000.00	
<b>Total 6200 · Maintenance &amp; Repairs</b>	<b>198,250.00</b>	<b>7,892.02</b>	<b>3.98%</b>	<b>7,892.02</b>	<b>3.98%</b>	<b>190,357.98</b>	
<b>6300 · Office/Stations</b>							
6305 · Software Expense	36,040.00	0.00	0.00%	0.00	0.00%	36,040.00	
6315 · Accounting Fees	9,400.00	1,400.45	14.90%	1,400.45	14.90%	7,999.55	
6325 · Postage/Shipping	700.00	0.00	0.00%	0.00	0.00%	700.00	
6330 · Subscriptions/Memberships	17,500.00	2,212.60	12.64%	2,212.60	12.64%	15,287.40	
6335 · Advertising/Printing/Postings	1,000.00	0.00	0.00%	0.00	0.00%	1,000.00	
<b>Total 6300 · Office/Stations</b>	<b>64,640.00</b>	<b>3,613.05</b>	<b>5.59%</b>	<b>3,613.05</b>	<b>5.59%</b>	<b>61,026.95</b>	
<b>6400 · Training</b>							
	<b>Annual Budget</b>	<b>Jan 24</b>	<b>% Budget Used in Jan</b>	<b>Jan YTD</b>	<b>% Budget Used YTD</b>	<b>Balance Available</b>	
6410 · Training Classes	51,200.00	3,125.00	6.10%	3,125.00	6.10%	48,075.00	
6415 · Equipment	100,000.00	0.00	0.00%	0.00	0.00%	100,000.00	
<b>Total 6400 · Training</b>	<b>151,200.00</b>	<b>3,125.00</b>	<b>2.07%</b>	<b>3,125.00</b>	<b>2.07%</b>	<b>148,075.00</b>	

**Battlefield Fire Protection District**  
**Profit & Loss Budget Performance**  
**Jan 2024**

	Annual Budget	Jan 24	% Received	Jan YTD	% Received YTD	Revenue Still Expected	Revenue Over Expected
<b>6500 · Legal</b>							
<b>6510 · Audit Fees</b>	6,700.00	0.00	0.00%	0.00	0.00%	6,700.00	
<b>6525 · Cafeteria Pass Thru</b>	1,500.00	1,539.34	102.62%	1,539.34	102.62%	-39.34	
<b>6535 · Attorney Fees</b>	5,000.00	302.50	6.05%	302.50	6.05%	4,697.50	
<b>Total 6500 · Legal</b>	13,200.00	1,841.84	13.95%	1,841.84	13.95%	11,358.16	
<b>6600 · Salaries</b>							
<b>6605 · District Personnel</b>	2,770,616.00	194,292.24	7.01%	194,292.24	7.01%	2,576,323.76	
<b>6610 · Board of Directors</b>							
<b>6612 · Chaplain Expense</b>	2,000.00	64.30	3.22%	64.30	3.22%	1,935.70	
<b>6610 · Board of Directors - Other</b>	9,400.00	350.00	3.72%	350.00	3.72%	9,050.00	
<b>Total 6610 · Board of Directors</b>	11,400.00	414.30	3.63%	414.30	3.63%	10,985.70	
<b>6620 · Employer Payroll Taxes</b>	49,203.00	2,598.79	5.28%	2,598.79	5.28%	46,604.21	
<b>6625 · Lagers</b>	626,086.00	24,907.13	3.98%	24,907.13	3.98%	601,178.87	
<b>6635 · Uniforms</b>	10,000.00	135.33	1.35%	135.33	1.35%	9,864.67	
<b>6640 · 457 Pass Thru</b>		4,050.20	0.00%	4,050.20	0.00%	-4,050.20	
<b>6650 · Miscellaneous Board Expense</b>	500.00	0.00	0.00%	0.00	0.00%	500.00	
<b>6655 · Expense Account</b>	3,000.00	0.00	0.00%	0.00	0.00%	3,000.00	
<b>6665 · Special Overtime</b>	50,000.00	654.35	1.31%	654.35	1.31%	49,345.65	
<b>6668 · Union Dues Pass Thru</b>		1,051.62	0.00%	1,051.62	0.00%	-1,051.62	
<b>6675 · Background Check</b>	3,250.00	0.00	0.00%	0.00	0.00%	3,250.00	
<b>Total 6600 · Salaries</b>	3,524,055.00	228,103.96	6.47%	228,103.96	6.47%	3,295,951.04	
			<b>%Budget</b>		<b>%Budget Used</b>	<b>Balance</b>	
<b>6700 · Medical</b>	<b>Annual Budget</b>	<b>Jan 24</b>	<b>Used in Jan</b>	<b>Jan YTD</b>	<b>YTD</b>	<b>Available</b>	
<b>6710 · Employee Physicals/POET</b>	38,000.00	554.14	1.46%	554.14	1.46%	37,445.86	
<b>Total 6700 · Medical</b>	38,000.00	554.14	1.46%	554.14	1.46%	37,445.86	

**Battlefield Fire Protection District**  
**Profit & Loss Budget Performance**  
Jan 2024

	Annual Budget	Jan 24	% Received	Jan YTD	% Received YTD	Revenue Still Expected	Revenue Over Expected
<b>6750 · Utilities</b>							
<b>6755 · Water</b>	2,000.00	118.74	5.94%	118.74	5.94%	1,881.26	
<b>6760 · Sanitation</b>	3,250.00	233.07	7.17%	233.07	7.17%	3,016.93	
<b>6765 · Sewer</b>	3,000.00	172.35	5.75%	172.35	5.75%	2,827.65	
<b>6770 · Electric/Gas</b>	35,000.00	2,912.43	8.32%	2,912.43	8.32%	32,087.57	
<b>6775 · Internet/Phones/Cable</b>	14,300.00	1,283.52	8.98%	1,283.52	8.98%	13,016.48	
<b>Total 6750 · Utilities</b>	57,550.00	4,720.11	8.20%	4,720.11	8.20%	52,829.89	
<b>6800 · Supplies</b>							
<b>6810 · Public Relations/Outreach</b>	29,600.00	40.00	0.14%	40.00	0.14%	29,560.00	
<b>6815 · Logo Imprinted Supplies</b>	3,000.00	0.00	0.00%	0.00	0.00%	3,000.00	
<b>6820 · Fire &amp; EMS Expendables</b>	5,000.00	412.14	8.24%	412.14	8.24%	4,587.86	
<b>6825 · Office Supplies</b>		1,067.61	#DIV/0!	1,067.61	#DIV/0!	0.00	
<b>6830 · Janitorial Supplies</b>	3,000.00	95.40	3.18%	95.40	3.18%	2,904.60	
<b>6835 · Stations/Buildings Supplies</b>	9,500.00	96.96	1.02%	96.96	1.02%	9,403.04	
<b>Total 6800 · Supplies</b>	50,100.00	1,712.11	3.42%	1,712.11	3.42%	48,387.89	
<b>6850 · Property Improvements</b>							
<b>6860 · Stations/Buildings</b>	800,000.00	0.00	0.00%	0.00	0.00%	800,000.00	
<b>Total 6850 · Property Improvements</b>	800,000.00	0.00	0.00%	0.00	0.00%	800,000.00	
<b>Total Expense</b>	6,362,263.02	319,730.89	5.03%	319,730.89	5.03%	5,982,505.18	
<b>Net Revenue</b>	<b>27,689.98</b>	<b>4,603,445.20</b>	16624.95%	<b>4,603,445.20</b>	16624.95%	<b>-4,479,401.05</b>	
<b>Total Budget Amount</b>						5,982,505.18	
	Monthly Expenditures		YTD Expenditures				
	319,730.89		319,730.89				
<b>Restricted Funds</b>							
<b>Operating Reserve</b>						700,000.00	
<b>Emergency Equipment Reserve</b>						339,576.00	
<b>Building Reserve</b>						500,000.00	
<b>Total Contingency Fund</b>						1,539,576.00	

**Battlefield Fire Protection District**  
**Custom Transaction Detail Report**  
**January 2024**

	<b>Date</b>	<b>Name</b>	<b>Memo</b>	<b>Paid Amount</b>
<b>Jan 24</b>				
	01/16/2024	GovDeals	Deposit	1,040.00
	01/23/2024	Greene County Collector of Revenue	ARPA County Wide Application	11,986.38
	01/23/2024	Ozarks Technical Community College	Firefighter I & II Classes	1,000.00
<b>Jan 24</b>				<b>14,026.38</b>



BATTLEFIELD FIRE PROTECTION DISTRICT | 132480

**Plan Review**

Prepared on: Jan 16, 2024

Period ending: Dec 31, 2023

Presented by: Tony Reahr



FOR PLAN SPONSOR USE ONLY. NOT FOR USE WITH PLAN PARTICIPANTS.



# What's inside?

## Your Plan Review

Your plan review summarizes the current state of your plan with John Hancock. This report provides you with key statistics and allows you to compare them to industry averages, where available. This may help you see which elements of your plan are working as expected, and which areas may need improving.

Executive Summary & Key Benchmarks	Page 4
Retirement Readiness	Page 6
Activity	Page 13
Services and Features	Page 17
Retirement Plan Costs	Page 18
Investments	Page 21

### Important considerations

All data found within this report represents 12 months as of the month end noted on the front cover unless otherwise stated.

Industry benchmarking data for total assets is based on Form 5500 information (as of April 2021). PlanSponsor Magazines 2021 Defined Contribution Survey - Industry data is used for participation/deferral rates, investments offered & average investments used. John Hancock block data is as of December 31, 2021. Both Industry and John Hancock benchmarks for participation and deferral rates are based on 457 Plans industry averages. Fund availability is subject to regulatory approval and some Funds may not be available in all states. Contact your John Hancock representative for more information. Though we believe the source of this information to be reliable, its accuracy or completeness cannot be guaranteed. This report does not constitute investment advice by John Hancock or any of its representatives and is not a substitute for professional, financial or legal advice. Neither John Hancock nor any of its affiliates or representatives is providing investment, financial or legal advice. Please contact your financial representative for more information.

# Your team

as of Jan 16, 2024

At John Hancock, we believe that plans should focus on putting participants first and to help them realize the retirement future they've promised themselves. That's why we work as a team to offer you a suite of services and tools to provide you with everything from flexible plan design, tailored pricing, personalized enrollment and education solutions and dedicated service.

---

## Financial Representative

ANTHONY REAHR	573-964-5712
---------------	--------------

## John Hancock

SHEILA SAYCON Client Account Representative	1-800-333-0963 EXT: 607729 SAYCOSH@jhancock.com
--	--

# Executive Summary & Key Benchmarks

BATTLEFIELD FIRE PROTECTION DISTRICT Plan Review | 132480 | Data as of December 31, 2023

Contract snapshot	Your plan	% change	John Hancock block	Industry peers
<b>Total assets</b>	\$961,248.86	34.1%	\$2,735,696.30	\$2,381,894.77
Cash account balance (incl in total assets)	\$0.00	N/A		
Number of account holders	51	6.2%		
Number of active participants	34	-10.5%		
Average account balance				
Mean	\$17,738.94	26.4%		
Median	\$6,395.40	62.8%		
<b>Participant Engagement</b>				
Participation rate	100.0%	5.4%	74.1%	70.0%
Average deferral rate	9.0%	-6.2%	8.3%	7.0%
% of active participants that have set a goal	50.0%	73.0%		
% of goal setters on track to achieve their goal*	11.8%	-56.8%		
Participants enrolled via				
Online & phone	0.0%	N/A		
Paper	100.0%	0.0%		
<b>Investment snapshot</b>				
# of investment options offered*	41	0.0%	31	19
# of investment options with assets*	8	60.0%		
Average # of investment options used by participants*	1	0.0%	2	4
% in one Asset Allocation option only	94.1%	-3.8%		
% in two or fewer non asset allocation options only	0.0%	N/A		
Average participant 1yr rate of return**	19.6%	N/A		

WILSHIRE3(21)  
investment profile  
selected  
**321-FEE**

...

Investment allocation benchmarks	Your plan	John Hancock block	Industry peers <sup>†</sup>
<b>Age &lt; 50</b>			
% invested in Target Date or Lifestyle Asset Allocation options	97.2%	66.0%	38.0%
% Equity	2.8%	25.0%	44.0%
% Bond	0.0%	2.0%	4.0%
% Capital preservation	0.0%	2.0%	3.0%
% Other	0.0%	5.0%	11.0%
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Age 50 or &gt;</b>			
% invested in Target Date or Lifestyle Asset Allocation options	100.0%	55.0%	27.0%
% Equity	0.0%	29.0%	45.0%
% Bond	0.0%	5.0%	7.0%
% Capital preservation	0.0%	5.0%	8.0%
% Other	0.0%	7.0%	13.0%
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

\*Data is calculated monthly and based on assumptions as set out on the tool.

\*\*Average is based on participants' Rate of Return for the past 12 months and calculated as of the last available quarter. Percentage change is not calculated for Rate of Return at this time.

†EBRI study; 401(k) Plan Asset Allocation, Account Balances and Loan Activity - Issue Brief August 2019; Plans with GICs and/or SV Funds

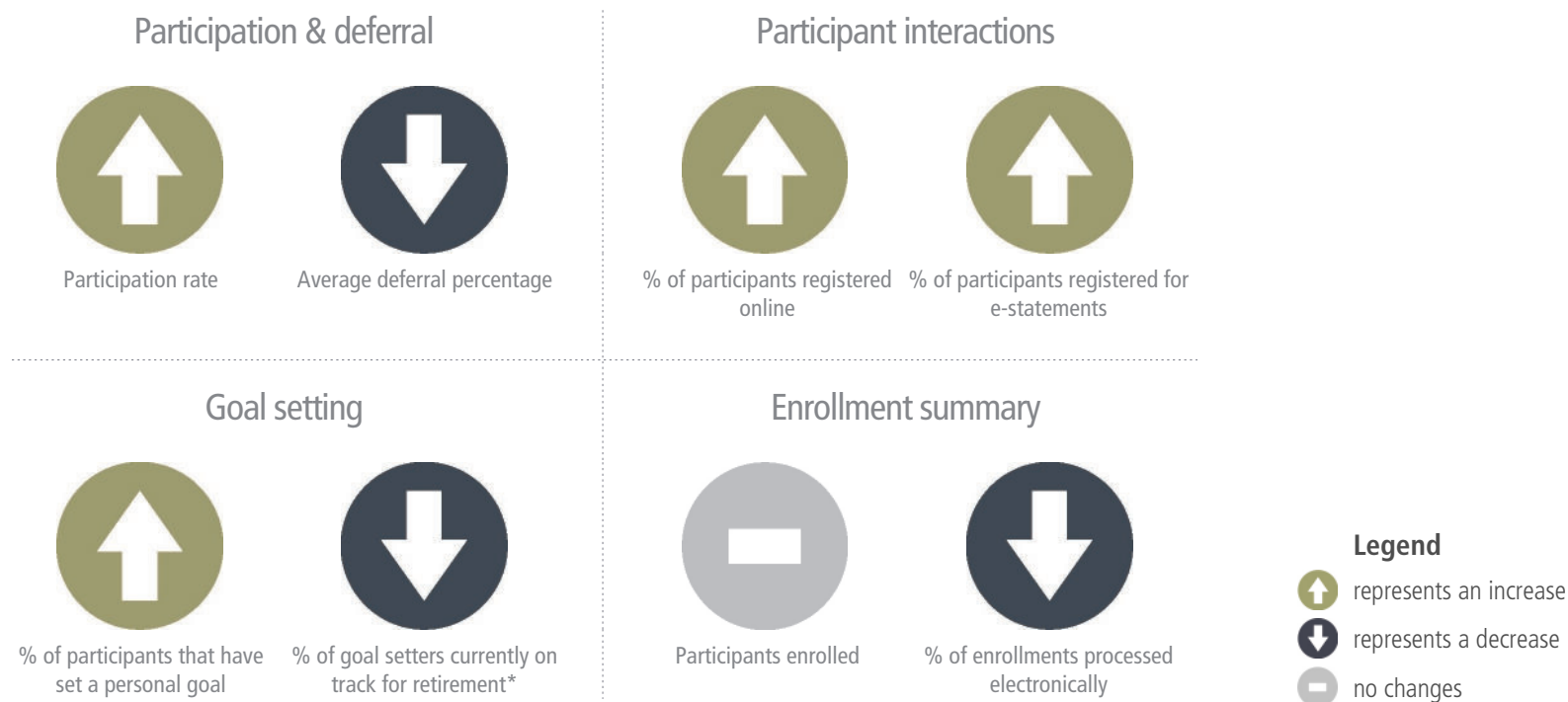
\*Asset Allocation suites (if applicable) are counted as a single fund for benchmarking purposes.

# Retirement readiness

## Why is it important?

You've made a commitment to provide your employees with a qualified retirement plan and given them the tools to participate. Part of that commitment is to help them take advantage of these tools so they can have the best chance for a better retirement outcome. By periodically reviewing some of the benchmarks for retirement readiness, we can help ensure that you have the right participant experience that centers on what matters the most. Here's a quick snapshot of some key statistics and how they have trended compared to the previous period. More detailed information can be found on each topic in the pages ahead.

## How did your plan do?



\*Data is calculated monthly and based on assumptions as set out on the tool.

# Retirement readiness

## Are your employees participating?

Participation is a key indicator in measuring the health of your plan. Higher participation helps in creating a positive attitude towards the company and helps with employee retention. How is this calculated? This rate is calculated by taking the number of active employees with a balance on our recordkeeping system and dividing them by the total number of eligible employees provided to John Hancock through census. The table below provides a breakdown of account holders on our system.

### Participation rate



### How does your plan compare?

Your plan **exceeds** the industry average

**Important Note** – This rate is calculated using census information provided to John Hancock. It's important to provide us with up-to-date census information on a regular basis for all employees so that we can provide you with a meaningful rate.

Active account holders					Inactive account holders‡			Grand Total
Year	With balance and contributing	With balance not contributing	No balance	Total	With balance	With non vested balance	Total	
2021	32	5	2	39	10	0	10	49
2022	31	5	2	38	10	0	10	48
2023	34	0	0	34	17	0	17	51

‡Participants are typically considered inactive after a withdrawal transaction has been processed and they are no longer actively contributing.

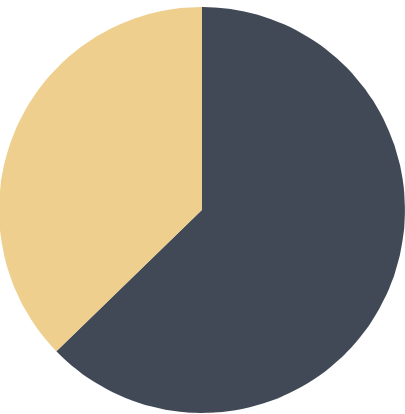
**Inactive with balance** – means only a partial withdrawal may have been processed so assets are still present

**Inactive with non vested balance** – means only employer non vested money remains in the account

**Note:** these balances may carry recordkeeping and/or investment fees, which could continue to apply as long as they remain in the participants account.

# Participation

% of assets by participant status

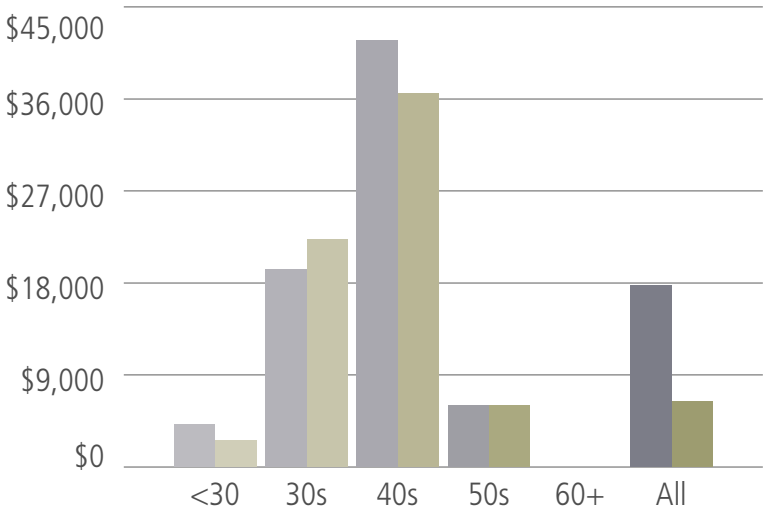


62.7%	\$603,124.03	Active – with balance & contributing
0.0%	\$0.00	Active – with balance not contributing
37.3%	\$358,124.83	Inactive – with balance
0.0%	\$0.00	Inactive – with non vested balance

Active participants: average balances

Period	Your plan	
	Mean	Median
2019	\$17,911.81	\$7,974.24
2020	\$14,731.63	\$11,434.63
2021	\$16,898.14	\$8,203.52
2022	\$14,032.09	\$3,928.71
2023	\$17,738.94	\$6,395.40

Active participants: average balances by age



Mean - Total account balances divided by the number of participants  
Median - Ordering each balance low to high and taking the middle value

# Deferral summary

## How much are your employees deferring?

Participation is just one element of a healthy plan. When you encourage your plan participants to increase their deferrals you, your plan, and your participants may all benefit. On this page you'll find the plans average deferral % that we've been provided with compared to benchmarks. The table below is a breakdown of the % and \$ based information. Note: If we received both a % and a \$ value through census or an enrollment form, the participant may be counted in both columns.

Active participants: average deferral %



### How does your plan compare?

Your plan **exceeds** the industry average

As of the date of this report we have deferral % information on 25 out of 34 participants.

**Important Note** – This rate is calculated using census information provided to John Hancock. It's important to provide us with up-to-date census information for all employees on a regular basis so that we can provide you with a meaningful rate.

Participants by age group	Deferral % provided to John Hancock				Deferral \$ provided to John Hancock			
	# of participants	Deferral % pre-tax	Deferral % post-tax	Avg total deferral % *	# of participants	Deferral \$ pre-tax	Deferral \$ post-tax	Avg total deferral \$ *
Under 30	9	6.8%	6.0%	<b>8.0%</b>	3	\$0.00	\$86.67	<b>\$86.67</b>
30-39	11	8.1%	8.5%	<b>11.3%</b>	0	\$0.00	\$0.00	<b>\$0.00</b>
40-49	5	5.9%	0.0%	<b>5.9%</b>	2	\$132.50	\$150.00	<b>\$207.50</b>
50-59	0	0.0%	0.0%	<b>0.0%</b>	1	\$50.00	\$25.00	<b>\$75.00</b>
60+	0	0.0%	0.0%	<b>0.0%</b>	0	\$0.00	\$0.00	<b>\$0.00</b>
<b>All</b>	<b>25</b>	<b>7.1%</b>	<b>7.6%</b>	<b>9.0%</b>	<b>6</b>	<b>\$105.00</b>	<b>\$87.00</b>	<b>\$125.00</b>

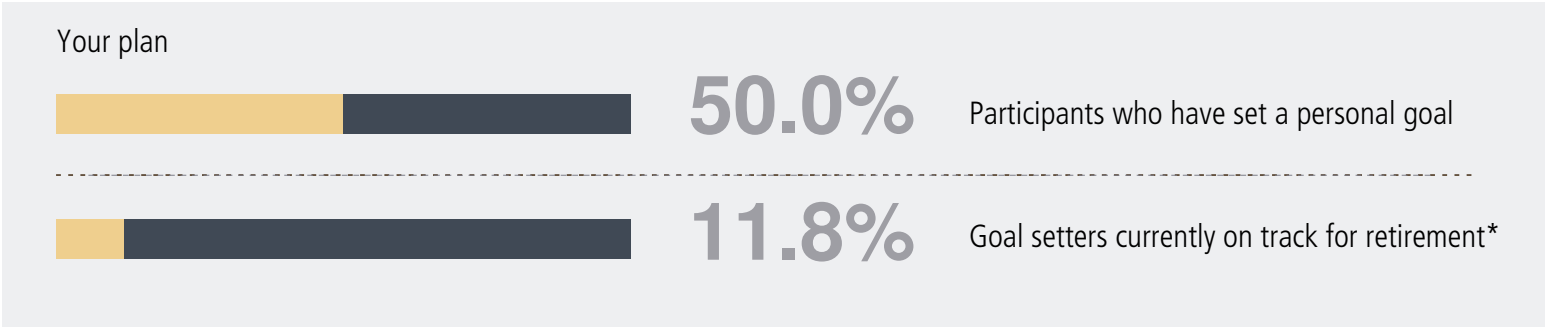
\*Note: If a participant is deferring both pre and post tax values, both values are added together before averaging



# Personal retirement planner

## Who may be ready for retirement and who needs a little help?

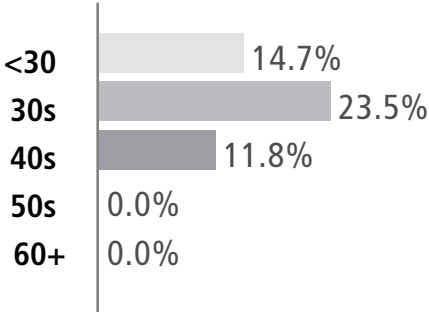
The personalized planner features a simple but powerful tool to help your participants visualize and plan for the retirement they want. They can set a personal goal based on their plans for retirement and their unique situation and track their progress over time.



## Your participants

Age	# with a personal goal	% with a personal goal	% goal setters on track
<30	5	38.5%	0.0%
30s	8	61.5%	0.0%
40s	4	57.1%	50.0%
50s	0	0.0%	0.0%
60+	N/A	0.0%	0.0%
Total	17		

## Who has set a personal goal?



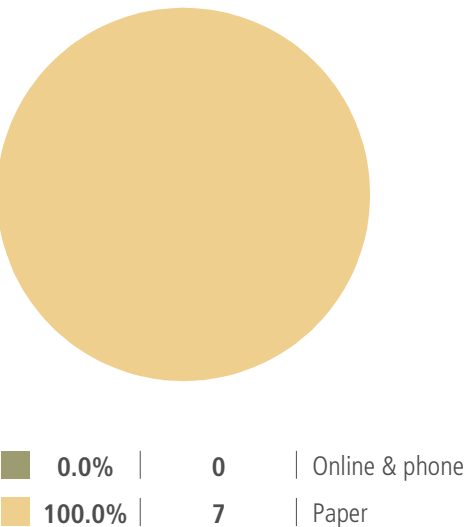
\*Data is calculated monthly and based on assumptions as set out on the tool.

# Enrollment summary

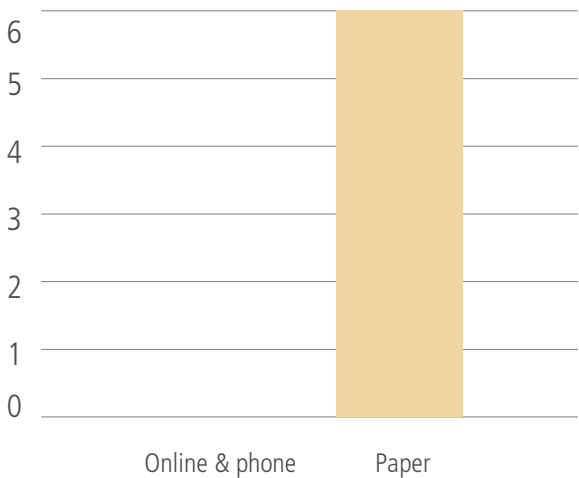
We learned a long time ago that a one-size-fits-all approach just doesn't work when it comes to employee engagement and participation. That's why we developed our high-tech, high-touch approach to enrollment. No matter what level of engagement you or your employees need, we have an option to meet it.

## Enrollment channel usage

Your plan



Deferral % selected by enrollment method\*



## Quick stats

7	Participants enrolled this period
0	Participants currently default enrolled
0	Participants with unknown date of birth
0.0%	Processed electronically

\* 0 participants provided a deferral % electronically  
3 participants provided a deferral % by paper

# Participant interactions

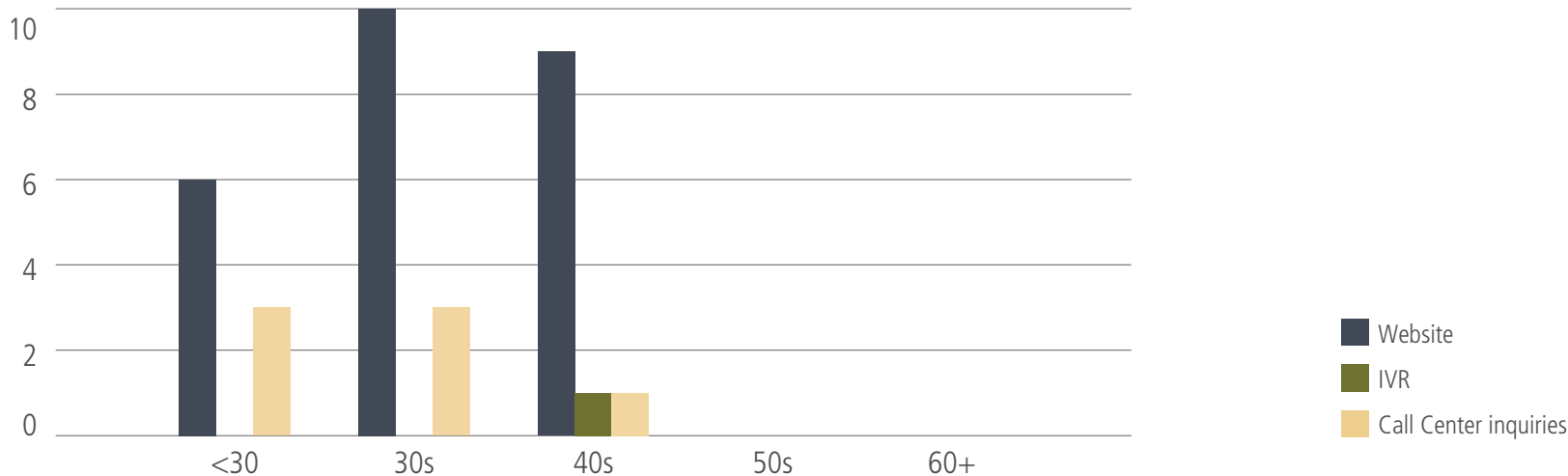
## Quick stats - active participants

56.9%	of participants are registered online
49.0%	of registered participants opted for e-statements
51.0%	of registered participants opted for paper statements

## Channel usage - all participants

	# of ppts	% of ppts	# of transactions
Website	25	49.0%	4
IVR	1	2.0%	0
Call Center inquiries	7	13.7%	9

## Transactions processed by channel - by age

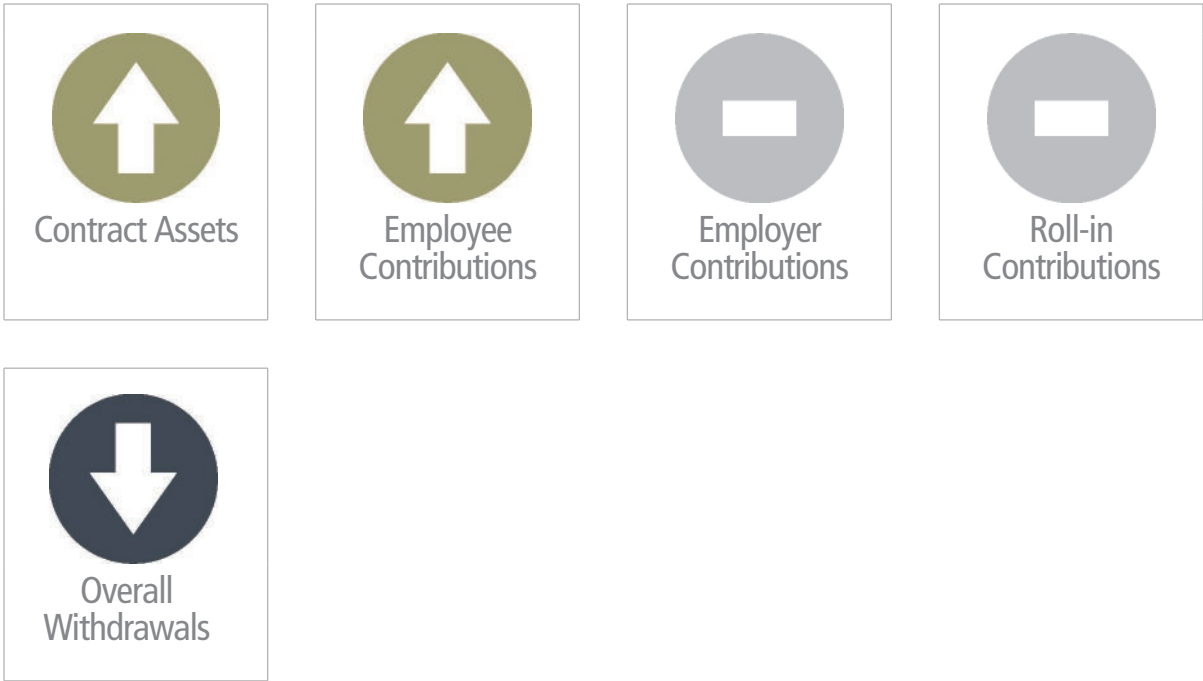


# Plan activity




In this section, you will find important information about contract level activity and transactions.

On this page, we've provided you with a quick snapshot of some key transactions for your plan and what is trending compared to the previous year. More detailed information can be found on each topic in the pages ahead.

## What happened in your plan?



**Legend**

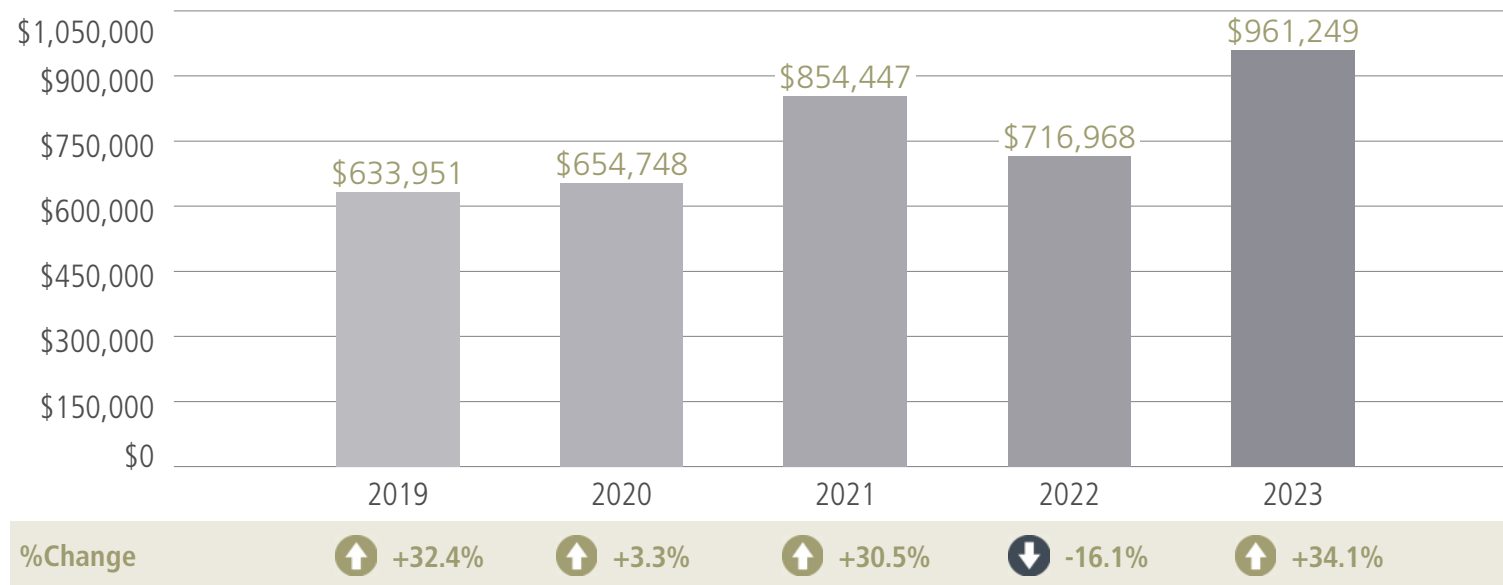
-  represents an increase
-  represents a decrease
-  no changes

Note: There may be differences between the amounts reported here and on regularly issued reports and statements that your plan receives from John Hancock. This is due to differences in timing and recording methods. For this reason you should not use this document for audit purposes. All figures are as of the date indicated.

# Contract assets

This page presents information about your total contract assets and asset growth. We have also provided the latest industry and John Hancock peer group averages for comparison purposes. All figures are as of the month end indicated.

## Total contract assets (\$961,249 | +34.1%)



### 2021 Benchmarks: Total assets

How your plan compares to others in the same industry

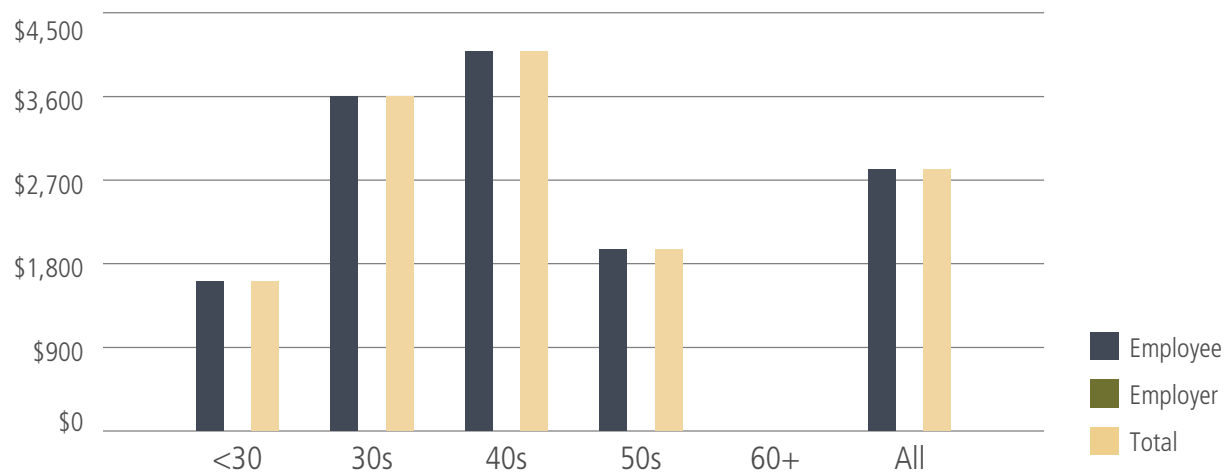
John Hancock block average	\$2,735,696.30
Industry peer average	\$2,381,894.77

# Contribution summary

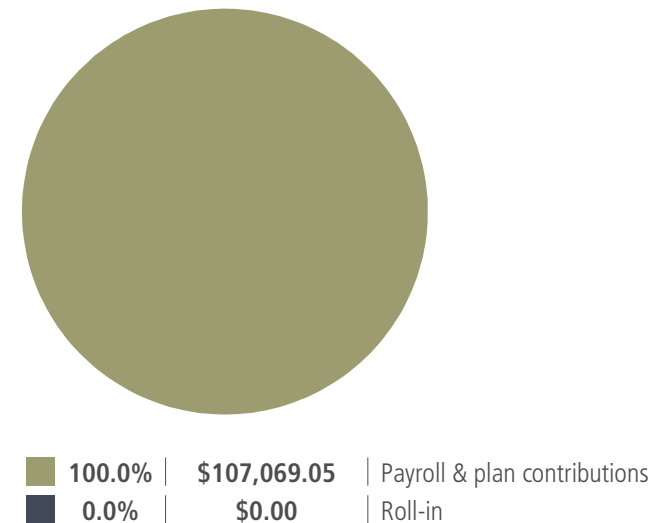
Contributions are provided as a rolling period from the month end selected and may not match calendar period statements as a result. Only deposits received by the month end selected are shown and exclude transfer deposits. Roll-in deposits (if applicable) are employee consolidations from external sources (i.e. assets from a previous employer).

Period	Employee				Employer				Grand total
	Pre-tax	Post-tax	Roll-in	Total	Match	Profit sharing	Other	Total	
2019	\$60,984.13	\$28,699.00	\$0.00	<b>\$89,683.13</b>	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>	<b>\$89,683.13</b>
2020	\$52,422.00	\$32,149.60	\$0.00	<b>\$84,571.60</b>	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>	<b>\$84,571.60</b>
2021	\$57,557.38	\$34,474.02	\$0.00	<b>\$92,031.40</b>	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>	<b>\$92,031.40</b>
2022	\$61,423.11	\$31,128.85	\$0.00	<b>\$92,551.96</b>	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>	<b>\$92,551.96</b>
2023	\$69,226.96	\$37,842.09	\$0.00	<b>\$107,069.05</b>	\$0.00	\$0.00	\$0.00	<b>\$0.00</b>	<b>\$107,069.05</b>

## Average contributions



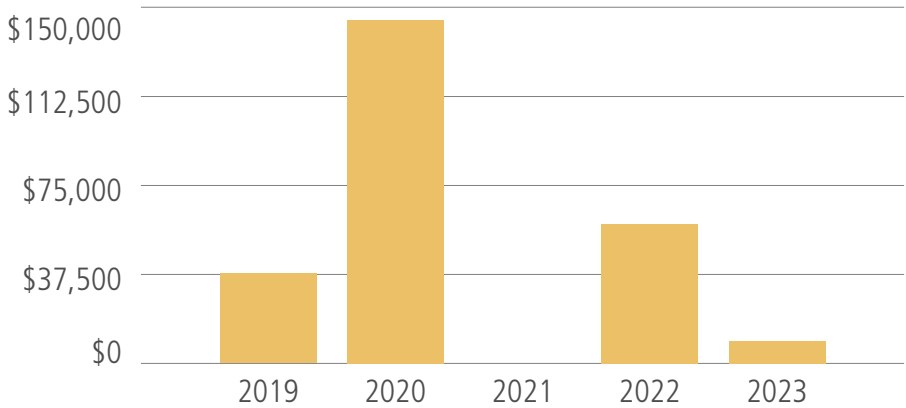
## Employee & employer contributions vs roll-in



# Withdrawal summary

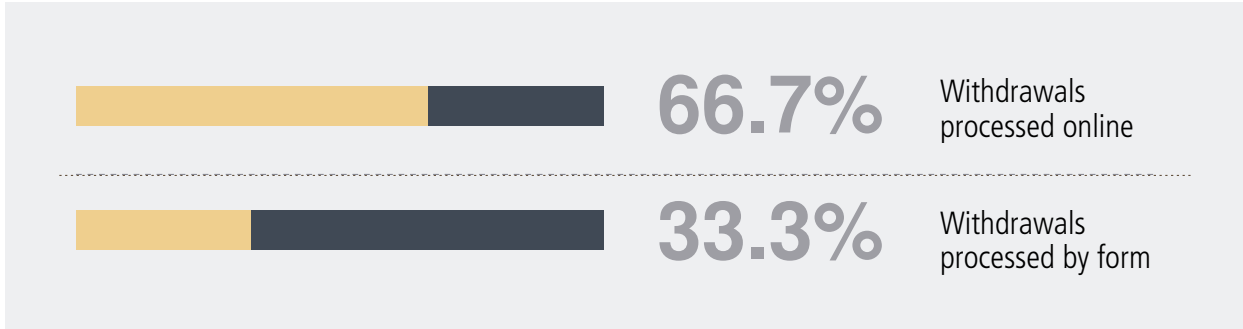
This page details withdrawals by year. These include all amounts withdrawn from the contract excluding loans and fees. It also breaks down some common withdrawal types and provides additional information on how withdrawals were submitted (ie. electronic vs paper). All figures are as of the date indicated.

## Withdrawals



## Withdrawal Types

Type	Processed	Withdrawal \$
Termination	3	\$9,344.94
Retirement	0	\$0.00
Excess withdrawals	0	\$0.00
Other	0	\$0.00
Systematic withdrawals		
Termination	0	\$0.00
Retirement	0	\$0.00
Pre-retirement	0	\$0.00
Required minimum distribution	0	\$0.00



# Services and Features

A number of value added services and features are available to your plan. This page highlights which services and features are currently available and which ones have been selected by your plan.

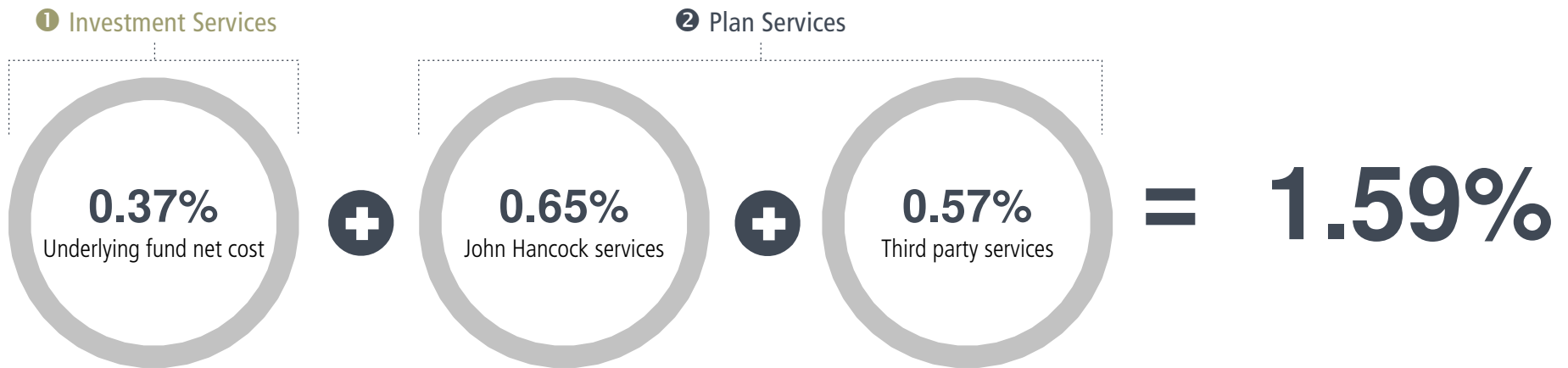
Contract Services	Features <b>Selected</b>	Features <b>Not Selected</b>
Participant management	<ul style="list-style-type: none"> <li>Online enrollment (paperless)</li> <li>Participant web access</li> <li>Goal setting</li> <li>Paperless statements (edelivery)</li> <li>Online investment changes</li> <li>Automated rebalances</li> <li>Online deferral management</li> <li>Online beneficiary designation service</li> <li>Participant address management</li> <li>IVR access</li> </ul>	
Plan management	<ul style="list-style-type: none"> <li>Vesting services</li> </ul>	<ul style="list-style-type: none"> <li>Automatic enrollment (JH EZstart)</li> <li>Automatic contribution increase (JH Ezincrease)</li> <li>Eligibility calculation service</li> <li>Payroll path</li> <li>Plan highlights by John Hancock</li> <li>Contract documents on the web</li> <li>Payroll 360</li> </ul>
Financial transactions	<ul style="list-style-type: none"> <li>Online withdrawals</li> <li>Systematic withdrawals</li> </ul>	<ul style="list-style-type: none"> <li>Online loans</li> </ul>
Investment services	<ul style="list-style-type: none"> <li>Wilshire 3(21) Advisor Service</li> </ul>	<ul style="list-style-type: none"> <li>Wilshire 3(38) Investment Management Service</li> </ul>

The availability of products, Funds and contract features may be subject to Broker Dealer firm approval, State Approval, Broker Licensing requirements, tax law requirements, or other contract-related requirements.



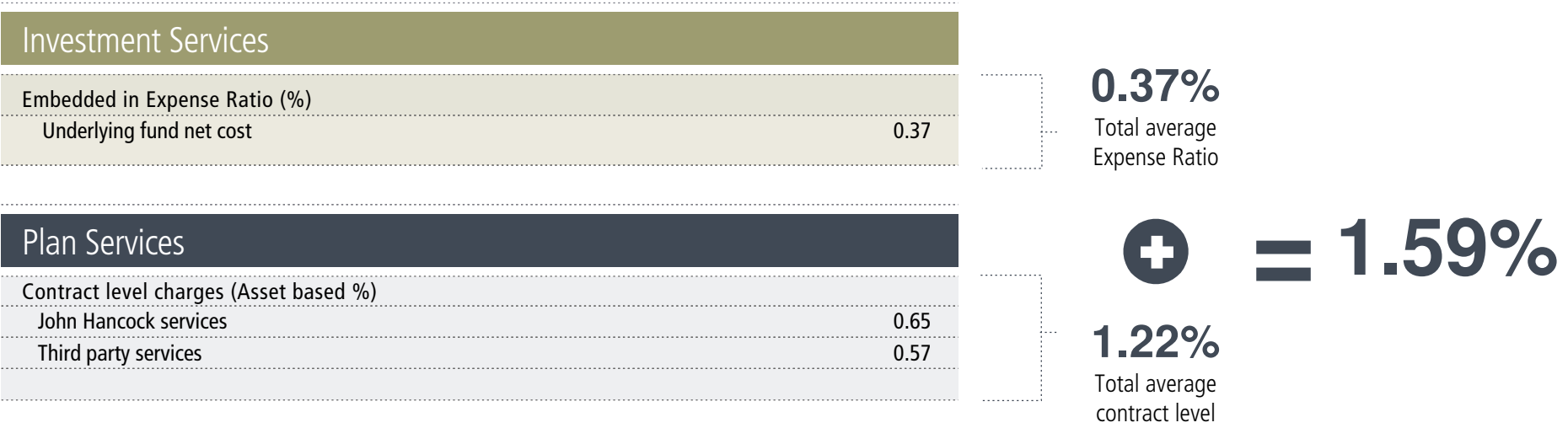
# Summary of your retirement plan costs

In general, when it comes to plan costs, there are two major components: ❶ Costs for investment services (which can include investment management, advisory and other investment related expenses), and ❷ those for plan services (which can include recordkeeping, advisor expenses). Below, you'll find a breakdown of the estimated costs for investment and plan services collected through John Hancock. The values presented on this page are based on the assets for the period selected and do not include any dollar based fees (if applicable). Small differences between figures shown on this page may occur due to rounding. For more details on how your plan costs are paid, please see the breakdown on the following page.



# Details on how your plan costs are paid

The previous page provides you with an overall summary of your plan costs. On this page, you will find details on how those costs are paid through the plan.



Glossary












**John Hancock services** include recordkeeping, education, enrollment and other various services to help fully support your plan.

The fees displayed in this section represent a total of the fees collected through the John Hancock group annuity contract, including amounts collected by John Hancock and paid to third party service provider at your direction. As a result, totals presented here may not be reflected in your John Hancock 408(b)(2) disclosures as some third party service provider amounts would typically be included in the disclosures provided by those service providers. For more information on service provider compensation, please see the 408(b)(2) disclosures provided by John Hancock and other service providers. The fee amounts estimated are collected by John Hancock and are based on the data available as of the date of this report. Unless otherwise specified, charges for any plan year are determined in accordance with charges set out in your Contract documents. The totals estimated may vary based on the actual amount of assets held within the Contract, as well as the amount of transfer and recurring contributions into the Contract, and investment allocations under the Contract. Amounts shown are generally rounded to the nearest 100th of a percent. This summary does not include transaction-based fees (such as loan processing fees) charged in accordance with the Contract or Record-Keeping Agreement. Other fees may also apply; refer to your Contract or Record-Keeping Agreement or 408(b)(2) disclosures for more information.

# Plan Sponsor contacts summary

As of Jan 16, 2024

This page outlines all the plan sponsor contacts we have on file and what role and access level they have. A legend of the different access attributes can be found below.

Name	Role	Access/attributes	Phone	Email
TREVOR CRIST	Trustee	 ,  ,  , 	417-881-6623	tcrist@nixonins.com
Dennis Reynolds	Authorized Signer	 , 		dreynolds@battlefieldfire.com
Scott Moore	Authorized Signer			smoore@battlefieldfire.com
Shane Anderson	Authorized Signer	 ,  , 	417-489-4554	sanderson@battlefieldfire.com
Shawn Shupert	Administrative Contact		417-881-9018	sshupert@battlefieldfire.com
Pam Payne	Plan Sponsor Payroll Administrator		417-882-2000 ext:104	pam@thepayrollco.com

## Access/attributes/legend

 Client mail recipient	 Trustee mail recipient	 Primary contact	 Signature received - authorized signature	 Signature received - trustee	 No web access	 Direct Debit	 Investment Comparative Chart designate
---	--	---	---	--	---	--	--

# Investments

## Market Commentary

(For the quarter ending June 30, 2023)

Most equity markets generated positive returns in the second quarter, extending their rise from the previous quarter. U.S. equities started the second quarter on a slow note, as markets traded mostly flat before rallying in the latter weeks of the quarter. U.S. inflationary readings continued to ease, leading the U.S. Federal Reserve (Fed) to keep its key benchmark rate unchanged in June after having raised it in each of its 10 previous meetings dating to early 2022; however, with the U.S. labor market continuing to exceed expectations amid resilient job growth, the majority of Fed policymakers signaled in June that they expected to raise rates an additional two times later in 2023, absent unexpected shifts in economic data. In addition to the Fed's June pause in raising rates, U.S. equities were lifted by an easing of the rising rate pressures that had contributed to the failures of two regional U.S. banks shortly before the start of the quarter.

Outside the United States, inflationary pressures persisted in many European markets. In June, the European Central Bank lifted its benchmark rate to the highest level since 2001. In China, the economy continued to rebound in the wake of the nation's late 2022 removal of restrictive COVID-19 rules, but growth nevertheless fell below expectations, and Chinese equities under-performed those of other major markets.

U.S. equities outperformed ex-U.S. developed-market indexes, as measured by the 8.74% total return for the S&P 500 Index versus the MSCI EAFE's 2.95% result. Emerging-market equities under-performed, with the MSCI Emerging Markets Index generating a 0.90% return. Within U.S. equities, large-cap growth stocks generally outperformed their value counterparts by wide margins, as they had in the previous quarter. Nine of the 11 sectors within the S&P 500 Index posted positive returns, with information technology and consumer discretionary generating the strongest returns and utilities and energy posting the weakest results. At the market capitalization level, large caps generally out-performed mid caps and small caps.

Fixed income continued to experience elevated volatility amid shifting expectations about the direction of monetary policy as inflationary pressures eased in most major economies. A benchmark, the Bloomberg U.S. Aggregate Bond Index posted a 0.84% return and the yield of the 10-year U.S. Treasury bond rose from 3.49% at the close of the previous quarter to 3.81% at the end of the second quarter. The yield moved in a wide range, slipping to as low

as 3.29% on April 5. The yield curve remained inverted throughout the quarter, as the 2-year Treasury note's quarter-end yield of 4.87% exceeded that of the 10-year Treasury by a wide margin. In commodities markets, the price of crude oil declined around 7%, with U.S. crude futures trading around \$70 per barrel at quarter-end.

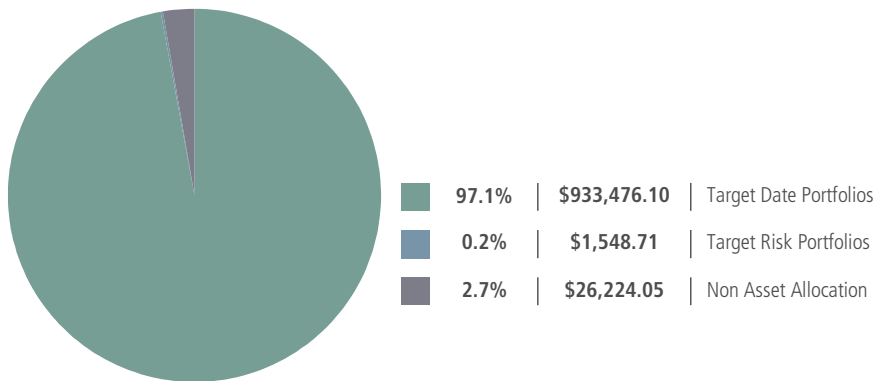
# Investment overview

In this section, you'll find important information to help you evaluate the investment options offered by your plan. You'll also see which investment options are most popular with your plan participants and spot if any diversification or risk tolerance issues may exist. Note: In the table below, we've counted asset allocation suites (if applicable) as a single fund for benchmarking purposes.

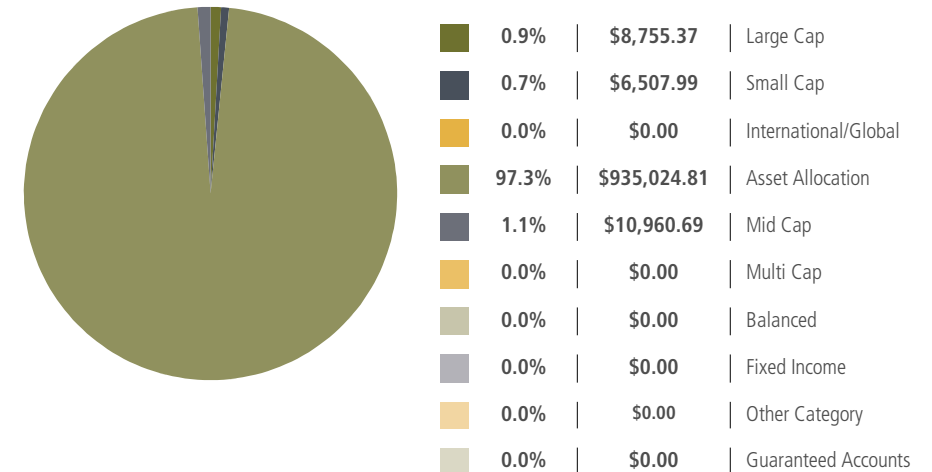
Item	Your plan	John Hancock peers	Industry peers
# of investment options offered	41	31	19
# of investment options with assets	8		
Average # of investment options used by participants	1	2	4
Asset allocation options offered	Target Date and Target Risk Portfolios		
Default investment option	American Funds Target Date Retirement Series		

## Plan assets breakdown

### Overall breakdown



## Asset class breakdown



# Investment options asset class and style

The table shows how many investment options are selected by asset class and investment style.

## Equity

Large Cap		
Value - 2 -	Blend - 4 -	Growth - 2 -
Mid Cap		
Value - 1 -	Blend - 2 -	Growth - 2 -
Small Cap		
Value - 1 -	Blend - 1 -	Growth - 1 -
International/Global		
Value - 2 -	Blend - 1 -	Growth - 2 -

## Specialty/Sector/Balanced

Specialty - 1 -	Sector - 3 -	Balanced - 2 -
--------------------	-----------------	-------------------

59 Investment options selected

## Asset Allocation

Target Date - 12 -	Target Risk - 9 -
-----------------------	----------------------

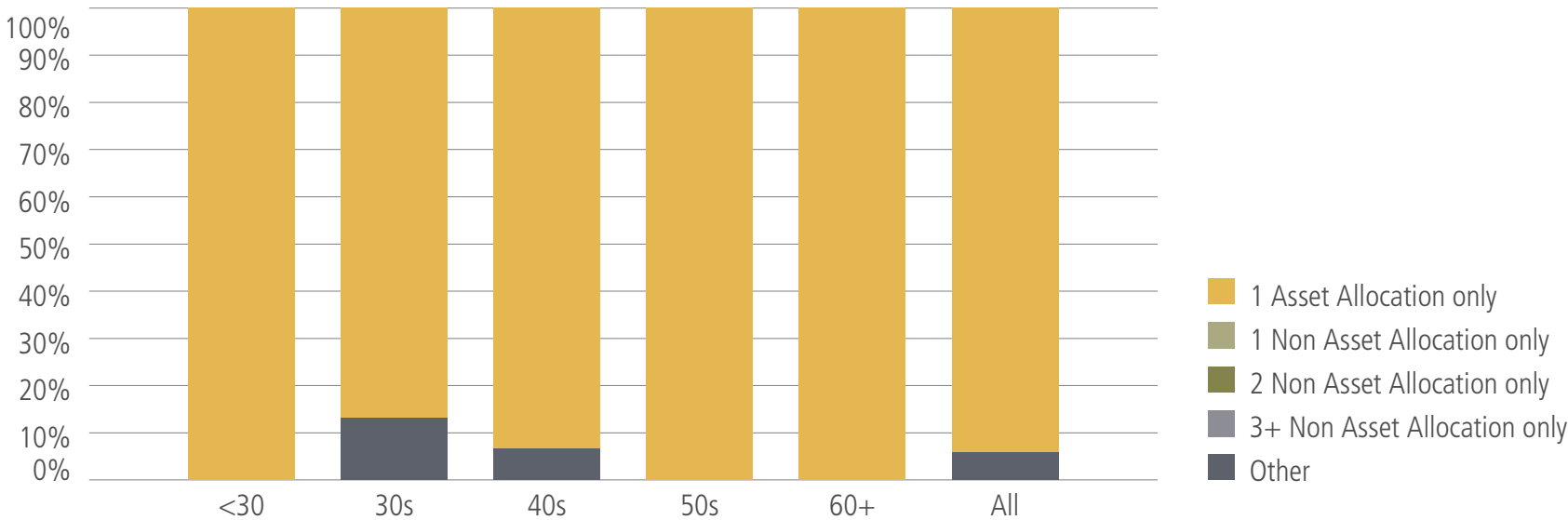
## Fixed Income

Short Term			
High Quality - 1 -	Medium Quality - 1 -	Low Quality - 2 -	Global - 1 -
Intermediate Term			
High Quality - 2 -	Medium Quality - 2 -	Low Quality - 0 -	Global - 0 -
Long Term			
High Quality - 0 -	Medium Quality - 0 -	Low Quality - 0 -	Global - 2 -

# Diversification by investment options

The following table outlines how participants are invested by single asset allocation options compared to non asset allocation combinations. "Other" includes all other combinations that are not already listed in the legend. You can use this information to see if a particular age group may benefit from education about the importance of diversification\*.

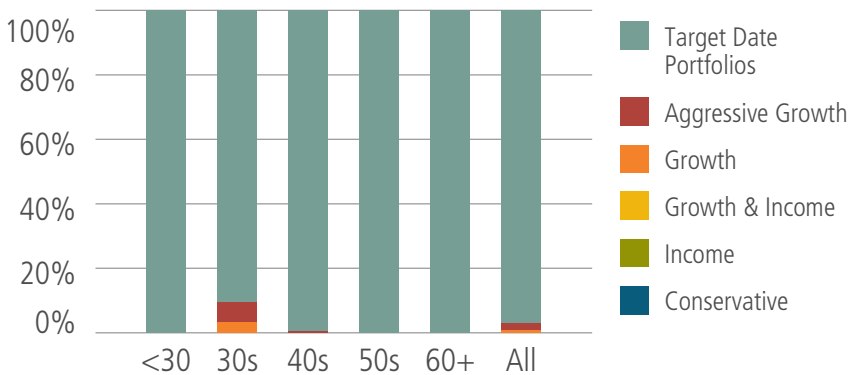
% of participants by number of Funds



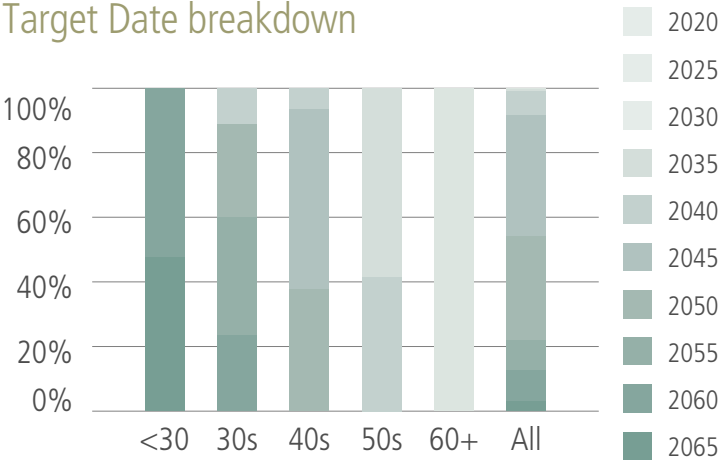
\*Diversification does not guarantee a profit or assure against a loss.

# Investment risk category by age

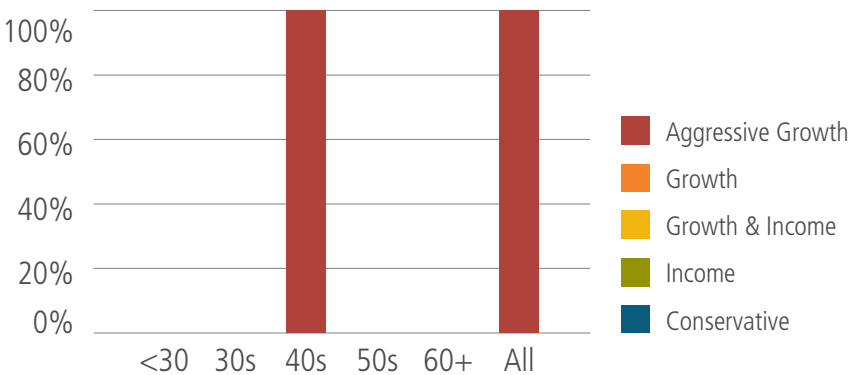
Overall plan breakdown



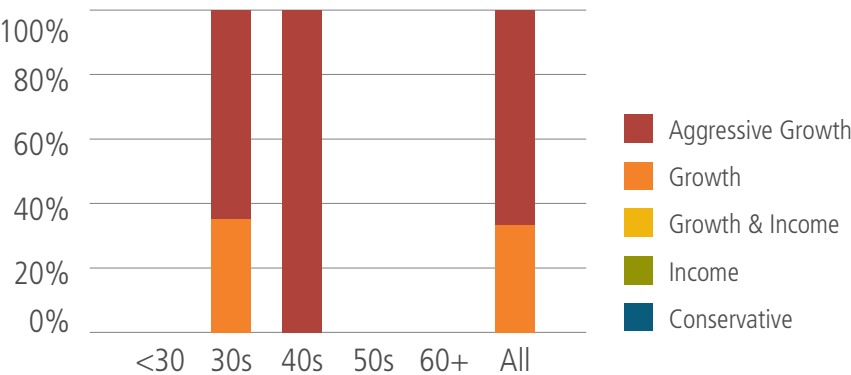
Target Date breakdown



Target Risk breakdown



Non asset allocation breakdown





# Investment options by assets

This table shows how contract assets were allocated by participants among all the investment options available.

Please see the next chart for investment options with \$0 assets invested.

## Investment options sorted by assets - highest to lowest

Investment Option	Risk Category	# of ppts	% of ppts	Total assets	% of total assets
American Funds 2045 TD	Target Date	8	15.7%	<b>\$346,574.19</b>	<b>36.0%</b>
American Funds 2050 TD	Target Date	10	19.6%	<b>\$302,751.77</b>	<b>31.5%</b>
American Funds 2060 TD	Target Date	12	23.5%	<b>\$89,380.86</b>	<b>9.3%</b>
American Funds 2055 TD	Target Date	3	5.9%	<b>\$85,204.38</b>	<b>8.9%</b>
American Funds 2040 TD	Target Date	4	7.8%	<b>\$69,789.31</b>	<b>7.3%</b>
American Funds 2065 TD	Target Date	12	23.5%	<b>\$31,060.26</b>	<b>3.2%</b>
Fidelity Mid Cap Index Fund	Aggressive Growth	2	3.9%	<b>\$9,423.88</b>	<b>1.0%</b>
American Funds 2035 TD	Target Date	1	2.0%	<b>\$5,975.14</b>	<b>0.6%</b>
500 Index Fund	Growth	1	2.0%	<b>\$5,831.10</b>	<b>0.6%</b>
TIAA-CREF Small-Cap Blend Idx	Aggressive Growth	1	2.0%	<b>\$3,479.72</b>	<b>0.4%</b>
Invesco Small Cap Growth	Aggressive Growth	1	2.0%	<b>\$3,028.27</b>	<b>0.3%</b>
Blue Chip Growth Fund	Growth	1	2.0%	<b>\$2,924.27</b>	<b>0.3%</b>
American Funds 2030 TD	Target Date	1	2.0%	<b>\$2,740.19</b>	<b>0.3%</b>
JH Lifestyle Blend Aggressive	Asset Allocation - Target Risk	1	2.0%	<b>\$1,548.71</b>	<b>0.2%</b>
Hartford MidCap Fund	Aggressive Growth	1	2.0%	<b>\$1,536.81</b>	<b>0.2%</b>
<b>Total Target Date portfolios</b>		<b>51</b>	<b>100.0%</b>	<b>\$933,476.10</b>	<b>97.1%</b>
<b>Total Target Risk portfolios</b>		<b>1</b>	<b>2.0%</b>	<b>\$1,548.71</b>	<b>0.2%</b>
<b>Total Asset Allocation options (Target Date + Target Risk)</b>		<b>52</b>	<b>102.0%</b>	<b>\$935,024.81</b>	<b>97.3%</b>
<b>Total non Asset Allocation options</b>		<b>3</b>	<b>5.9%</b>	<b>\$26,224.05</b>	<b>2.7%</b>
<b>Total all investment options</b>				<b>\$961,248.86</b>	<b>100.0%</b>

# Investment options with \$0 assets

## Investment options with \$0 assets

Investment option	Risk category
AF Capital World Bond Fund	Income
AF The Income Fund of America	Growth & Income
American Funds 2010 TD	Target Date
American Funds 2015 TD	Target Date
American Funds 2020 TD	Target Date
American Funds 2025 TD	Target Date
American Funds New Perspective	Growth
BlackRock Global Allocation	Growth & Income
DFA Inflation-Protected Sec	Income
Eaton Vance Atlanta SMID-Cap	Aggressive Growth
Federated High Yield Bond	Income
Fidelity Real Estate Index	Aggressive Growth
Floating Rate Income Fund	Income
Fundamental All Cap Core Fund	Growth
Intl Equity Index Fund	Growth
Invesco Core Plus Bond Fund	Income
Investment Company of America	Growth
iShares MSCI EAFE Growth ETF	Growth
JH Disciplined Value Intl Fund	Growth
JH Lifestyle Blend Balanced	Asset Allocation - Lifestyle
JH Lifestyle Blend Growth	Asset Allocation - Lifestyle
JH Lifestyle Blend Moderate	Asset Allocation - Lifestyle
JH Lifestyle Bln Conservative	Asset Allocation - Lifestyle
JH Managed Volatility Bal	Asset Allocation - Lifestyle
JH Managed Volatility Con	Asset Allocation - Lifestyle
JH Managed Volatility Growth	Asset Allocation - Lifestyle
JH Managed Volatility Mod	Asset Allocation - Lifestyle
Lord Abbett Core Fixed Income	Income
Lord Abbett Short Duration Inc	Conservative

## Investment options with \$0 assets (continued)

Investment option	Risk category
Lord Abbett Value Opps Fund	Aggressive Growth
MFS Blended Research Core Eq	Growth
MFS Mid Cap Value Fund	Aggressive Growth
Money Market Fund	Conservative
Mutual Global Discovery	Growth
Northern EM Equity Index Fund	Aggressive Growth
PGIM Global Total Return Fund	Income
PIMCO Commodity Real Return	Growth
T. Rowe Price Equity Inc	Growth
T. Rowe Price New Era Fund	Aggressive Growth
Templeton Global Bond Fund	Income
Total Bond Market Fund	Income
Undiscovered Mgr Behavioral	Aggressive Growth
Vanguard High Dividend Yld Idx	Growth
Washington Mutual Investors	Growth



The performance data presented represents past performance. Past performance is no guarantee of future results and current performance may be lower or higher than the performance quoted. An investment in a sub-account will fluctuate in value to reflect the value of the sub-account's underlying securities and, when redeemed, may be worth more or less than original cost. Performance does not reflect any applicable contract-level or certain participant-level charges, fees for guaranteed benefits if elected by participant, or any redemption fees imposed by an underlying mutual fund company, collective trust or ETF. These charges, if included, would otherwise reduce the total return for a participant's account. For month-end performance, plan sponsors please call 1-800-333-0963 and financial representatives 1-877-346-8378. Closed funds are displayed in grey.

The performance data for a sub-account for any period prior to the sub-account Inception Date is hypothetical based on the performance of the underlying investment since inception of the underlying investment. Hypothetical returns are shown in **bold**. All other performance data is actual (except as otherwise indicated). Returns for any period greater than one year are annualized.

Index performance shown is for a broad-based securities market index, are unmanaged and cannot be invested in directly. Index returns were prepared using Morningstar Direct data. The performance of an Index does not include any portfolio or insurance-related charges. If these charges were reflected, performance would be lower. Past performance is not a guarantee of future results.

Some Funds may be marked with a "•". In these cases, the underlying fund (the mutual fund, collective trust, or exchanged traded fund ("ETF") in which the investment option invests) has either waived a portion of, or capped, its fees. The Expense Ratio (ER) for these funds is that of the sub account and reflects the net expense ratio of the underlying fund after such expense waiver or cap. Please see the Fund Sheet for details, including gross expenses.

If this Plan is participating in the John Hancock Investment Selection Program, the Expense Ratios for certain funds in this program may differ from the Expense Ratios of these funds on the Signature Menu (for Plans that are not participating in the program).

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*11</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>
Equity Funds										
Large Cap Value										
T. Rowe Price Equity Income Fund <sup>130</sup>	T. Rowe Price	07/30/99	9.81%	10.22%	11.49%	8.14%	18.60%	19.90%	15.68%	0.52%
Vanguard High Dividend Yield Index Fund <sup>181</sup>	Vanguard	05/05/17	6.51%	10.18%	10.91%	9.32%	16.63%	17.67%	14.00%	0.08%
Large Cap Blend										
• 500 Index Fund <sup>110,128,13,187,76,91</sup>	John Hancock	01/19/93	26.21%	9.93%	15.63%	11.99%	17.85%	18.96%	14.95%	0.05%
American Funds The Investment Company of America <sup>160,243,38</sup>	American Funds	05/02/03	28.91%	11.06%	14.47%	10.94%	16.57%	17.47%	13.99%	0.27%
American Funds Washington Mutual Investors Fund <sup>194,240,243,38</sup>	American Funds	05/02/03	17.59%	11.64%	13.63%	10.93%	15.84%	16.90%	13.53%	0.27%
• MFS Blended Research Core Equity Fund <sup>165</sup>	MFS	11/04/16	28.59%	11.98%	15.96%	11.21%	17.60%	19.17%	15.15%	0.24%

Investment returns<sup>\*1</sup> and standard deviation<sup>\*15</sup>

Contract Name: BATTLEFIELD FIRE

Contract Number: 132480

Prepared on Jan 16, 2024

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*1</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>
Equity Funds										
Large Cap Growth										
• Blue Chip Growth Fund <sup>128,13,153</sup>	T. Rowe Price	10/02/97	49.90%	3.01%	13.96%	12.83%	21.86%	22.01%	17.68%	0.52%
Fundamental All Cap Core Fund <sup>13,38,91</sup>	John Hancock	05/02/03	35.81%	10.58%	18.78%	12.77%	21.08%	23.91%	19.07%	0.46%
Mid Cap Value										
• MFS Mid Cap Value Fund <sup>181</sup>	MFS	05/05/17	13.08%	10.72%	13.22%	8.98%	18.87%	21.55%	16.74%	0.49%
Mid Cap Blend										
Fidelity Mid Cap Index Fund <sup>181,209</sup>	Fidelity	05/05/17	17.22%	5.92%	12.68%	9.41%	19.51%	21.66%	16.76%	0.03%
Lord Abbett Value Opportunities Fund <sup>128,154,177,87</sup>	Lord Abbett	11/05/10	17.32%	5.59%	10.96%	7.52%	19.53%	21.09%	16.52%	0.66%
Mid Cap Growth										
Eaton Vance Atlanta Capital SMID-Cap Fund <sup>181,71</sup>	Eaton Vance	05/05/17	14.29%	8.59%	13.99%	11.44%	18.44%	20.82%	16.43%	0.64%
Hartford MidCap Fund <sup>128,181,204</sup>	Hartford	05/05/17	14.77%	-1.41%	9.74%	8.85%	20.62%	22.48%	17.68%	0.74%
Small Cap Value										
• Undiscovered Managers Behavioral Value Fund <sup>128,134</sup>	J.P. Morgan	11/07/14	14.56%	15.08%	14.26%	9.54%	24.02%	28.13%	21.32%	0.80%
Small Cap Blend										
TIAA-CREF Small-Cap Blend Index Fund <sup>165</sup>	TIAA-CREF	11/04/16	17.04%	2.34%	10.08%	7.33%	22.35%	24.33%	19.60%	0.06%
Small Cap Growth										
Invesco Small Cap Growth Fund <sup>130</sup>	Invesco	03/13/98	13.48%	-7.35%	9.50%	8.10%	23.98%	25.35%	19.90%	0.46%
International/Global Value										
Franklin Mutual Global Discovery Fund <sup>128</sup>	Franklin Templeton	11/22/96	20.88%	11.47%	10.67%	6.59%	17.61%	19.25%	14.94%	0.70%
• John Hancock Disciplined Value International Fund <sup>13,159,222</sup>	Robeco	07/30/99	19.58%	8.93%	9.56%	3.87%	19.67%	19.86%	15.79%	0.60%
International/Global Blend										
• International Equity Index Fund <sup>110,13,187,29,91</sup>	SSgA	08/18/00	15.63%	1.53%	7.15%	3.91%	18.03%	18.34%	15.06%	0.16%

Investment returns<sup>\*1</sup> and standard deviation<sup>\*15</sup>

Contract Name: BATTLEFIELD FIRE

Contract Number: 132480

Prepared on Jan 16, 2024

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*1</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>
Equity Funds										
International/Global Growth										
American Funds New Perspective Fund <sup>243,37</sup>	American Funds	07/25/08	25.01%	3.18%	13.91%	10.10%	19.33%	19.85%	15.62%	0.42%
iShares MSCI EAFE Growth ETF <sup>118,119,139,76</sup>	iShares	11/08/13	17.26%	0.07%	8.44%	4.65%	20.07%	18.69%	15.04%	0.42%
Specialty/Sector/Balanced										
Specialty										
• Northern Emerging Markets Equity Index Fund <sup>126</sup>	Northern Trust	05/02/14	9.21%	-5.58%	3.28%	2.29%	18.39%	19.66%	17.23%	0.09%
Sector										
Fidelity Real Estate Index Fund <sup>181</sup>	Fidelity	05/05/17	11.95%	5.17%	4.88%	6.32%	21.13%	21.27%	17.80%	0.07%
T. Rowe Price New Era Fund <sup>196,199,200,235</sup>	T. Rowe Price	05/04/18	1.27%	11.07%	9.45%	3.18%	21.02%	23.90%	19.71%	0.56%
• PIMCO Commodity Real Return Strategy Fund <sup>128,97</sup>	PIMCO	05/06/11	-7.49%	10.35%	8.79%	-0.63%	18.27%	19.26%	16.49%	0.99%
Balanced										
American Funds The Income Fund of America <sup>177,243,37</sup>	American Funds	07/25/08	7.94%	6.05%	8.42%	6.79%	12.03%	12.30%	9.88%	0.27%
• BlackRock Global Allocation Fund <sup>3</sup>	BlackRock	11/07/08	12.90%	0.64%	7.84%	5.06%	12.51%	12.60%	9.83%	0.59%

Investment returns<sup>\*1</sup> and standard deviation<sup>\*15</sup>

Contract Name: BATTLEFIELD FIRE

Contract Number: 132480

Prepared on Jan 16, 2024

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*1</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023	
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>	
Asset Allocation											
Target Date											
American Funds 2065 Target Date Retirement Fund <sup>114,227</sup>	American Funds	11/06/20	21.55%	4.64%	n/a	14.89%	15.99%	n/a	n/a	0.38%	
American Funds 2060 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	21.61%	4.62%	11.32%	8.88%	15.99%	16.49%	n/a	0.38%	
American Funds 2055 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	21.40%	4.65%	11.35%	8.73%	15.97%	16.50%	13.02%	0.38%	
American Funds 2050 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	20.83%	4.75%	11.41%	8.78%	15.77%	16.39%	12.95%	0.38%	
American Funds 2045 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	20.15%	4.83%	11.35%	8.73%	15.52%	16.12%	12.76%	0.37%	
American Funds 2040 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	19.33%	4.75%	11.17%	8.58%	15.10%	15.73%	12.48%	0.36%	
American Funds 2035 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	16.90%	4.20%	10.39%	8.15%	13.81%	14.52%	11.66%	0.35%	
American Funds 2030 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	14.52%	3.47%	8.90%	7.26%	12.16%	12.41%	10.16%	0.33%	
American Funds 2025 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	11.95%	2.87%	7.84%	6.41%	10.78%	10.78%	8.79%	0.32%	
American Funds 2020 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	10.46%	2.83%	6.89%	5.78%	9.82%	9.52%	7.72%	0.30%	
American Funds 2015 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	9.57%	2.74%	6.51%	5.39%	9.36%	9.02%	7.21%	0.30%	
American Funds 2010 Target Date Retirement Fund <sup>114,151,185</sup>	American Funds	03/24/16	8.67%	2.58%	6.07%	5.10%	8.64%	8.28%	6.68%	0.28%	
Target Risk											
John Hancock Lifestyle Blend Aggressive Portfolio <sup>126,128,13,179,253,91</sup>	John Hancock	05/02/14	17.79%	5.50%	11.31%	8.42%	17.05%	18.36%	n/a	0.16%	
John Hancock Lifestyle Blend Growth Portfolio <sup>126,128,13,179,253,91</sup>	John Hancock	05/02/14	15.76%	4.24%	9.76%	7.41%	14.94%	15.72%	n/a	0.17%	
John Hancock Lifestyle Blend Balanced Portfolio <sup>126,128,13,179,253,91</sup>	John Hancock	05/02/14	13.67%	2.78%	7.98%	6.26%	12.79%	13.19%	n/a	0.19%	
● John Hancock Lifestyle Blend Moderate Portfolio <sup>126,128,13,179,253,91</sup>	John Hancock	05/02/14	11.71%	1.47%	6.20%	5.05%	10.49%	10.54%	n/a	0.22%	
● John Hancock Lifestyle Blend Conservative Portfolio <sup>126,128,13,179,253,91</sup>	John Hancock	05/02/14	10.30%	0.33%	4.64%	3.98%	8.30%	8.14%	n/a	0.22%	
JH Managed Volatility Growth Portfolio <sup>126,127,128,13,186,228</sup>	John Hancock	05/02/14	14.03%	3.31%	5.57%	4.16%	10.25%	11.72%	9.47%	0.53%	

Investment returns<sup>\*1</sup> and standard deviation<sup>\*15</sup>

Contract Name: BATTLEFIELD FIRE

Contract Number: 132480

Prepared on Jan 16, 2024

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*1</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>
Asset Allocation										
Target Risk										
JH Managed Volatility Balanced Portfolio <sup>126,127,128,13,186</sup>	John Hancock	05/02/14	12.33%	1.77%	5.01%	4.27%	9.02%	9.91%	7.89%	0.50%
JH Managed Volatility Moderate Portfolio <sup>126,127,128,13,186</sup>	John Hancock	05/02/14	10.98%	0.86%	4.54%	4.18%	8.30%	8.87%	7.00%	0.50%
JH Managed Volatility Conservative Portfolio <sup>126,127,128,13,186</sup>	John Hancock	05/02/14	5.78%	-2.09%	2.11%	2.82%	6.84%	6.83%	5.28%	0.48%
Fixed Income Funds										
High Quality Short Term										
• Money Market Fund <sup>13,142,143,158,166,239,83,91</sup>	John Hancock	07/30/99	5.01%	2.15%	1.85%	1.26%	0.60%	0.48%	0.39%	0.08%
The current 7-day yield is 5.22% as of the performance date indicated above. The current yield quotation more closely reflects the current earnings of the Money Market Fund as of the date this report was prepared while the Annualized returns above refer to a specific past holding period reflecting the period covered by this report. Although the fund strives to maintain a positive yield, there is no guarantee the fund will be able to do so. The subaccount’s actual current yield may be lower or higher than that of the underlying trust. An investment in the underlying Money Market fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The underlying fund seeks to preserve a value of \$1.00 per share but it is possible to lose money by investing in the Money Market Fund that invests in the underlying fund. The Sponsor of the underlying fund has no legal obligation to provide financial support, and you should not expect that the Sponsor will provide financial support to the underlying fund at any time.										
Medium Quality Short Term										
Lord Abbett Short Duration Income Fund <sup>128,142,143,150,154,166,177,239,83</sup>	Lord Abbett	11/06/15	5.86%	0.85%	2.33%	2.34%	2.37%	3.82%	2.79%	0.18%
Low Quality Short Term										
• Federated Hermes Institutional High Yield Bond Fund <sup>128,225,226,87,88</sup>	Federated Hermes	11/05/10	13.17%	1.70%	5.11%	4.50%	7.97%	9.13%	7.19%	0.45%
• Floating Rate Income Fund <sup>105,128,13,142,143,166,239,83</sup>	Bain Capital	11/04/11	13.99%	4.97%	5.53%	3.91%	4.45%	7.75%	5.92%	0.42%
Global Short Term										
• Templeton Global Bond Fund <sup>128,87</sup>	Franklin Templeton	11/05/10	2.95%	-2.52%	-2.08%	-0.12%	8.79%	7.79%	7.04%	0.46%



Investment returns<sup>\*1</sup> and standard deviation<sup>\*15</sup>

Contract Name: BATTLEFIELD FIRE

Contract Number: 132480

Prepared on Jan 16, 2024

Hypothetical returns are shown in **bold**.

Investment Options <sup>*2</sup>	Manager Name/ Benchmark <sup>*3</sup>	Inception Date <sup>*10</sup>	Returns as of Dec 31, 2023 <sup>*1</sup>				Standard Deviation as of Sep 30, 2023 <sup>*15</sup>			As of Dec 31, 2023
			1yr	3yr	5yr	10yr/ Inception <sup>*10</sup>	3yr	5yr	10yr	Expense Ratio <sup>*6</sup>
Fixed Income Funds										
High Quality Intermediate Term										
DFA Inflation-Protected Securities Fund <sup>128,87</sup>	DFA	11/05/10	3.93%	-1.25%	3.12%	2.42%	7.56%	6.51%	5.43%	0.11%
● Total Bond Market Fund <sup>110,128,13,162,187,72,91</sup>	John Hancock	05/05/06	5.59%	-3.41%	0.99%	1.78%	6.35%	5.71%	4.47%	0.07%
Medium Quality Intermediate Term										
● Invesco Core Plus Bond Fund <sup>128,181</sup>	Invesco	05/05/17	6.60%	-2.97%	2.38%	2.88%	6.89%	6.79%	5.20%	0.25%
Lord Abbett Core Fixed Income Fund <sup>128,165</sup>	Lord Abbett	11/04/16	6.14%	-2.92%	1.44%	2.02%	6.04%	5.57%	4.33%	0.17%
Global Long Term										
American Funds Capital World Bond Fund <sup>214,243,37</sup>	American Funds	07/25/08	6.42%	-5.66%	0.06%	0.74%	9.07%	8.00%	6.49%	0.48%
● PGIM Global Total Return Fund <sup>181,201</sup>	Jennison	05/05/17	9.87%	-6.71%	0.16%	1.73%	10.11%	9.85%	7.99%	0.39%
Market Indexes										
Market Indexes (comparison purposes only)										
Standard & Poor's 500 Stock Index	S&P500	n/a	26.29%	10.00%	15.69%	12.03%	n/a	n/a	n/a	n/a
Barclay's Capital Gov't/Corp. Bond Index	Barclay's Capital	n/a	5.72%	-3.53%	1.41%	1.97%	n/a	n/a	n/a	n/a
MSCI World ex USA	MSCI	n/a	17.94%	4.42%	8.45%	4.32%	n/a	n/a	n/a	n/a
RUSSELL 2000 INDEX	Russell 2000 TR	n/a	16.93%	2.22%	9.97%	7.16%	n/a	n/a	n/a	n/a



## Footnotes

<sup>\*1</sup> The performance data for a sub-account for any period prior to the sub-account Inception Date is hypothetical based on the performance of the underlying investment since inception of the underlying investment. All other performance data is actual (except as otherwise indicated). Returns for any period greater than one year are annualized. Performance data reflects changes in the prices of a sub-account's investments (including the shares of an underlying mutual fund, collective trust, or ETF), reinvestment of dividends and capital gains and deductions for the sub-account charges.

The performance data presented represents past performance. Past performance is no guarantee of future results and current performance may be lower or higher than the performance quoted. An investment in a sub-account will fluctuate in value to reflect the value of the sub-account's underlying fund and, when redeemed, may be worth more or less than original cost. Performance does not reflect any applicable contract-level or participant-level charges, fees for guaranteed benefits if elected by participant, or any redemption fees imposed by an underlying mutual fund, collective trust or ETF. These charges, if included, would otherwise reduce the total return for a participant's account. Performance current for the most recent month-end is available at [www.jh401kadvisor.com](http://www.jh401kadvisor.com), plan sponsors please call 1-800-333-0963.

<sup>\*2</sup> Contributions under a group annuity contract issued by John Hancock Life Insurance Company (U.S.A.) (John Hancock USA) are allocated to investment options which: (a) invest solely in shares of an underlying mutual fund, collective trust or ETF or (b) are Guaranteed Interest Accounts and which will be held in the John Hancock USA general account. For more information on a particular investment option, please refer to John Hancock USA's Fund sheets, available through the Web site or your John Hancock USA representative.

The Funds offered on the JH Signature platform are classified into five risk categories. The risk category in which a Fund is placed is determined based on where the 10 year Standard Deviation (defined below) of the underlying fund's Morningstar Category falls on the following scale: if the 10 year Standard Deviation of the underlying fund's Morningstar Category is 17.00 or higher, the Fund is classified as "Aggressive;" between 11.50 and 16.99 as "Growth;" between 6.50 and 11.49 as "Growth & Income;" between 2.50 and 6.49 as "Income;" and 2.49 and below as "Conservative." If a 10 year Standard Deviation is not available for a Morningstar Category, then the 5 year Standard Deviation of the underlying fund's Morningstar Category is used to determine the Fund's risk category. If a 5 year Standard Deviation is not available for a Morningstar Category, then the 5 year Standard Deviation of the underlying fund's Morningstar Category Index is used to determine the Fund's risk category. Standard Deviation is defined by Morningstar as a statistical measurement of dispersion about an average, which, for an underlying fund, depicts how widely the returns varied over a certain period of time.

None of the Index Funds or the underlying portfolios are sponsored, endorsed, managed, advised, sold or promoted by any of the respective companies that sponsor the broad-based securities market index, and none of these companies make any representation regarding the advisability of investing in the Index Fund.

Allocating assets to only one or a small number of the investment options generally should not be considered a balanced investment strategy. In particular, allocating assets to a small number of options concentrated in particular business or market sectors will subject your account or contract to increased risk and

volatility. Examples of business or market sectors where this risk may be particularly high include: a) technology-related businesses, b) small-cap securities and c) foreign securities. John Hancock USA does not provide advice regarding appropriate investment allocations. Contact your financial representative for more details.

<sup>\*3</sup> Manager or Sub-Adviser refers to the manager of the underlying fund, or to the sub-adviser of the underlying John Hancock Trust, John Hancock Funds II, or John Hancock Funds III fund in which the sub-account invests. "Underlying fund" includes the underlying mutual fund, collective trust, or ETF in which a sub-account invests.

<sup>\*6</sup> This material shows expenses for a specific unit class for investment options available under a John Hancock group annuity contract. The Expense Ratio ("ER") shown represents the total annual operating expenses for the investment options made available by John Hancock. It is made up of John Hancock's (i) "Revenue from Sub-account", and (ii) the expenses of the underlying fund (based on expense ratios reported in the most recent prospectuses available as of the date of printing; "FER"). In the case where an underlying fund has either waived a portion of, or capped, its fees, the FER used to determine the ER of the sub-account that invests in the underlying fund is the net expense ratio of the underlying fund. "Underlying fund" or "fund" refers to the underlying mutual fund, collective trust, or exchanged traded fund ("ETF") in which the investment option invests.

The FER is determined by the underlying fund and is subject to fluctuation. Any change in the FER of an underlying fund will affect the Expense Ratio of the investment option which invests in the underlying fund.

The ER applies daily at a rate equivalent to the annual rate shown, and may vary to reflect changes in the expenses of an underlying fund and other factors. For Expense Ratio information current as of the most recent quarter end, please refer to the monthly "Return and Fees" listing available from John Hancock upon request. For more information, please contact your financial representative.

<sup>\*10</sup> Date sub-account or Guaranteed Interest Account first available under group annuity contract. Sub-account class introduction dates: The Signature Menu was introduced December 8, 2014. If the sub-account inception date is after December 8, 2014, then the Signature Menu introduction date is the same as the sub-account inception date. Class 1 = sub-account Inception Date; Class 6 = April 27, 1999; Classes 4, 5, 7 = February 23, 2007; Classes 2, 3, 8, 9 = May 23, 2008. If a sub-account inception date occurs after any of these dates then the class introduction date for that sub-account is the later of sub-account inception date and the class introduction date. A "class" or the Cost of Class of Funds selected by the contract (formerly known as "Sales and Service Fee" or "SSF"), represents the charge for compensation provided to your financial representatives for services provided to the plan.

<sup>\*15</sup> Standard deviation provides a measure of return variability. For example, a portfolio with a high standard deviation can be expected to have a wide range of annual returns and thus a relatively high level of risk. This is particularly true for portfolios investing in technology stocks, small-cap stocks or stocks in emerging/foreign markets. In contrast, a portfolio with relatively low standard deviation can be expected to have a narrow range of annual returns - low risk - such as a money market fund.



<sup>\*31</sup> Russell 3000 Index: Offers investors access to the broad U.S. equity universe representing approximately 98% of the U.S. market, and is constructed to provide a comprehensive, unbiased, and stable barometer of the broad market.

<sup>\*32</sup> The S&P Target Date® Series comprises multi-asset class indices, each corresponding to a particular target retirement date. Each index provides varying levels of exposure to equities and fixed income. Each target date allocation is created and retired according to a pre-determined schedule related to the respective target date.

<sup>\*33</sup> S&P 500 Index: A market capitalization-weighted index, composed of 500 widely-held common stocks. This index is designed to be a leading indicator of U.S. equities and is meant to reflect the risk/return characteristics of the large-cap universe.

<sup>\*34</sup> Barclays Capital U.S. Aggregate Bond Index: Made up of bonds from the Treasury, Government-Related, Corporate, Mortgage-Backed Security, Asset-Backed Security and Commercial Mortgage-Backed Security sectors. These include securities that are of investment-grade quality or better and have at least one year to maturity.

<sup>\*35</sup> Russell 1000 Index: Offers investors access to the extensive large-cap segment of the U.S. equity universe representing approximately 92% of the U.S. market, and is constructed to provide a comprehensive and unbiased barometer for the large-cap segment.

<sup>3</sup> This sub-account was introduced November 7, 2008.

<sup>13</sup> The total revenue John Hancock receives on this Fund is higher than those advised or sub-advised exclusively by unaffiliated entities. John Hancock and its affiliates provide advisory and/or sub-advisory services for the underlying fund. For these services, John Hancock and its affiliates receive additional fees which are included in the underlying fund expense ratio (i.e. Fund Expense Ratio or FER).

<sup>29</sup> This sub-account was introduced August 21, 2000.

<sup>37</sup> This sub-account was introduced July 25, 2008.

<sup>38</sup> This sub-account was introduced May 2, 2003.

<sup>71</sup> Only available under certain limited circumstances. Consult your John Hancock representative for more information.

<sup>72</sup> This sub-account was introduced on or about May 5, 2006.

<sup>76</sup> Indexes are unmanaged and the performance of an index is not an exact representation of any particular investment, as you cannot invest directly in an index. Like all mutual funds, index funds are subject to market risks and will fluctuate in value. Index funds are designed to track the performance of its target index but may underperform due to fees, expenses or tracking errors. These investments are not actively managed and do not necessarily attempt to manage volatility or protect against losses in declining markets.

None of the index funds are sponsored, endorsed, managed, advised, sold or promoted by any of the respective companies that sponsor the broad-based securities market index, and none of these companies make any representation regarding the advisability of investing in any index mutual fund.

<sup>83</sup> This investment option is deemed a "Competing" investment option with the John Hancock Stable Value Fund and may not be available. An investment in this portfolio is not insured or guaranteed by The Federal Deposit Insurance Corporation or any other government agency. Although the underlying portfolio seeks to preserve the value of an investment, it is possible to lose money by investing in this portfolio.

<sup>87</sup> This sub-account was introduced November 5, 2010.

<sup>88</sup> Important Redemption Fee Information: Federated Institutional High Yield Bond Fund - Effective November 5, 2010, the underlying fund will impose a 2% redemption fee on all selling/exchanges of the fund within a 90-day period. The "First-In/First-Out" ("FIFO") method will be used to determine whether the shares have been held for the prescribed holding period and, therefore, whether the redemption fee will be applied. Note: At the end of day on June 28th, 2019, this redemption fee will no longer apply.

<sup>91</sup> The underlying John Hancock Variable Insurance Trust portfolio is not a retail mutual fund and is only available under variable annuity contracts, variable life policies or through participation in tax qualified retirement plans. Although the portfolios' investment adviser or sub-advisers may manage retail mutual funds with similar names and investment objectives, no representation is made, and no assurance is given, that any portfolio's investment results will be comparable to the investment results of any other fund, including other funds with the same investment adviser or sub-adviser. Past performance is no guarantee of future results.

<sup>97</sup> This sub-account was introduced May 6, 2011.

<sup>105</sup> This sub-account was introduced November 4, 2011.

<sup>110</sup> This sub-account previously invested in a different underlying portfolio. It began investing in the current underlying portfolio effective November 2, 2012. Performance shown for periods prior to that date is based on the performance of the previous underlying portfolio/sub-account. The name of this sub-account may change effective on or about November 2, 2012 to more accurately reflect the name of the underlying fund.

<sup>114</sup> If John Hancock has been provided with your date of birth and no investment instructions at the time of enrollment, then, on the date of your enrollment, you will be default enrolled into a Target Date (Lifecycle Portfolio) based on your year of birth and a retirement age of 67, and subject to the Target Date then in existence.

<sup>118</sup> This sub-account was introduced November 8, 2013.

<sup>119</sup> The underlying fund expense ratio shown includes an annualized charge of 0.06% accrued daily, and deducted monthly out of the unitized version of the underlying fund provided by and traded through the trading platform of an unaffiliated third party.

<sup>126</sup> This sub-account was introduced May 3, 2014.

<sup>127</sup> During periods of extreme market volatility, the Portfolio's economic exposure to equity or fixed-income securities could be reduced to 0% and its economic exposure to cash and cash equivalents could increase to 100%.

<sup>128</sup> The indicated separate account is operated by John Hancock Life Insurance Company (U.S.A.), which has claimed an exclusion from the definition of the term 'Commodity Pool Operator' under the Commodity Exchange Act and, therefore, is not subject to registration or regulation as a pool operator under such Act.

<sup>130</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 8, 2014. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>134</sup> This sub-account was recently introduced on November 8, 2014 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.



<sup>139</sup> The returns of the sub-account may differ from the returns of the ETF in which the sub-account invests (referred to as 'tracking error'). Tracking error results from certain fees and transaction expenses incurred by the sub-account, from differences between the timing of purchases and redemptions of sub-account shares and corresponding transactions in the shares of the underlying ETF, and from the fact that the sub-account holds a small amount of cash (less than 1% of the value of the sub-account) in addition to shares of the ETF.

<sup>142</sup> This investment option is deemed a 'Competing' investment option with the Reliance Trust New York Life Anchor Account and may not be available if the Reliance Trust New York Life Anchor Account is selected. For further details, please refer to the Offering Statement and Declaration of Trust. Contact your John Hancock representative if you wish to obtain a copy.

<sup>143</sup> This investment option is deemed a 'Competing' investment option with the Federated Capital Preservation Fund and may not be available if the Federated Capital Preservation Fund is selected. For further details, please refer to the Offering Circular and Declaration of Trust. Contact your John Hancock representative if you wish to obtain a copy.

<sup>150</sup> This sub-account was recently introduced on November 7, 2015 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>151</sup> This sub-account was recently introduced on March 25, 2016 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>153</sup> Account balance reported may include assets transferred from another Fund, which was permanently closed on or about April 22, 2016. Please contact your John Hancock representative for more information.

<sup>154</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about June 11, 2016. Performance shown for periods prior to that date is based on the performance of the current share class.

<sup>158</sup> Effective April 6, 2016, the underlying holdings of the Money Market Fund were modified in order to comply with the definition of a Government money market fund as set out by the SEC. That ruling takes effect October 14, 2016.

<sup>159</sup> This sub-account previously invested in a different underlying portfolio. It began investing in the current underlying portfolio effective on or about November 4, 2016. Performance shown for periods prior to that date is based on the performance of the previous underlying portfolio.

<sup>160</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 4, 2016. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>162</sup> The underlying fund changed its sub-advisor on November 4, 2016 from Declaration Management & Research LLC/John Hancock Asset Management to John Hancock Management.

<sup>165</sup> This sub-account was recently introduced on November 4, 2016 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>166</sup> This investment option is deemed a 'Competing' investment option with the Reliance MetLife Stable Value Fund and may not be available if the Reliance MetLife Stable Value Fund is selected. For further details, please refer to the Offering Circular and Declaration of Trust. Contact your John Hancock representative if you wish to obtain a copy.

<sup>177</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about May 6, 2017. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>179</sup> The underlying fund changed its name effective on or about February 1, 2017. Performance shown for periods prior to that date reflect the results under its former name. The name of this sub-account changed effective on or about May 6, 2017 to more accurately reflect the name of the underlying fund.

<sup>181</sup> This sub-account was recently introduced on May 6, 2017 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>185</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 3, 2017. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>186</sup> The sub-account and underlying fund changed its name effective on or about November 3, 2017. Performance shown for periods prior to that date reflect the results under its former name.

<sup>187</sup> The underlying fund changed its name effective on or about November 3, 2017. Performance shown for periods prior to that date reflect the results under its former name.

<sup>194</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about May 4, 2018. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>196</sup> This sub-account was recently introduced on May 4, 2018 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>199</sup> Account balance reported may include assets transferred from another Fund, which was permanently closed on or about October 19, 2018. Please contact your John Hancock representative for more information.

<sup>200</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 2, 2018. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>201</sup> The sub-account and underlying fund changed its name effective on or about November 2, 2018. Performance shown for periods prior to that date reflect the results under its former name.

<sup>204</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about May 3, 2019. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>209</sup> Account balance reported may include assets transferred from another Fund, which was permanently closed on or about October 18, 2019. Please contact your John Hancock representative for more information.

<sup>214</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 1, 2019. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>222</sup> Account balance reported may include assets transferred from another Fund, which was permanently closed on or about October 16, 2020. Please contact your John Hancock representative for more information.



<sup>225</sup> The sub-account and underlying fund changed its name effective on or about November 7, 2020. Performance shown for periods prior to that date reflect the results under its former name.

<sup>226</sup> Effective November 7, 2020, the underlying fund and sub-account changed its manager from Federated Investment Management Company to Federated Hermes, Inc.

<sup>227</sup> This sub-account was recently introduced on November 7, 2020 and may not be available in all states. Contact your John Hancock representative to determine if this sub-account is available to your plan.

<sup>228</sup> Account balance reported may include assets transferred from another Fund, which was permanently closed on or about April 16, 2021. Please contact your John Hancock representative for more information.

<sup>235</sup> This sub-account previously invested in a different share class of the same underlying portfolio. It began investing in the current share class effective on or about November 5, 2021. Performance shown for periods prior to that date is based on the performance of the old share class.

<sup>239</sup> This investment option is deemed a 'Competing' investment option with John Hancock Stable Value Guaranteed Income Fund and may not be available. An investment in this portfolio is not insured or guaranteed by The Federal Deposit Insurance Corporation or any other government agency. Although the underlying portfolio seeks to preserve the value of an investment, it is possible to lose money by investing in this portfolio.

<sup>240</sup> Effective May 7, 2022, the underlying fund manager rebranded their company from Wells Fargo to AllSpring and as such the sub-account and underlying fund name has changed.

<sup>243</sup> The name of this sub-account changed effective on or about May 7, 2022.

<sup>253</sup> The sub-account and underlying fund changed its name effective on or about August 5, 2023. Performance shown for periods prior to that date reflect the results under its former name.

# Contract review verification

This is to verify that the contract has been reviewed as of the date(s) indicated below, using the data and information provided in this document. You may choose to file this verification for your records.

## Trustees

NAME	SIGNATURE	DATE
NAME	SIGNATURE	DATE
NAME	SIGNATURE	DATE
NAME	SIGNATURE	DATE

## Other company attendees

NAME	SIGNATURE	DATE
NAME	SIGNATURE	DATE

## Financial representative

NAME	SIGNATURE	DATE
------	-----------	------

## Others present

NAME	SIGNATURE	DATE
NAME	SIGNATURE	DATE

Please call 800-333-0963 to obtain Fund Sheets for the group annuity investment option subaccounts and to obtain prospectuses for the subaccounts' underlying funds, that are available on request. The prospectuses for the subaccounts' underlying funds contain complete details on investment objectives, risks, fees, charges and expenses as well as other information about the underlying funds which should be carefully considered before investing.

The Funds offered on the JH Signature platform are classified into five risk categories. The risk category in which a Fund is placed is determined based on where the 5 year Standard Deviation (defined below) of the underlying fund's Morningstar Category falls on the following scale: if the 5 year Standard Deviation of the underlying fund's Morningstar Category is 15.00 or higher, the Fund is classified as "Aggressive;" between 12.00 and 14.99 as "Growth;" between 7.00 and 11.99 as "Growth & Income;" between 2.00 and 6.99 as "Income;" and 1.99 and below as "Conservative." If a 5 year Standard Deviation is not available for a Morningstar Category, then the 3 year Standard Deviation of the underlying fund's Morningstar Category is used to determine the Fund's risk category. If a 3 year Standard Deviation is not available for a Morningstar Category, then the 5 year Standard Deviation of the underlying fund's Morningstar Category Index is used to determine the Fund's risk category. Standard Deviation is defined by Morningstar as a statistical measurement of dispersion about an average, which, for a mutual fund, depicts how widely the returns varied over a certain period of time.

John Hancock Life Insurance Company (U.S.A.) and Wilshire Associates Incorporated are not affiliated and neither are responsible for the liabilities of the other.

The total revenue John Hancock receives on affiliated Funds is higher than those advised or sub-advised exclusively by unaffiliated entities. John Hancock and its affiliates provide exclusive advisory and sub-advisory services for the underlying fund. For these services, John Hancock and its affiliates receive additional fees which are included in the underlying fund expense ratio (i.e. Fund Expense Ratio or FER).

Each Target Date (Lifecycle) and Target Risk (Lifestyle) portfolio is a "fund of funds" which invests in a number of underlying funds. The portfolio's performance depends will depend largely on the ability of the sub-adviser to select the appropriate mix of underlying funds and on the underlying funds' ability to meet their investment objectives. The underlying funds' performance may be lower than the performance of the asset class which they were selected to represent. The portfolio is subject to the same risks as the underlying funds in which it invests, which include the following: stocks and bonds can decline due to adverse issuer, market, regulatory or economic developments; foreign investing, especially in emerging markets, has additional risks, such as currency and market volatility and political and social instability; and the securities of small-capitalization companies are subject to

higher volatility than larger, more established companies; high-yield bonds are subject to additional risks, such as increased risk of default. As a portfolio's asset mix becomes more conservative, the fund becomes more susceptible to risks associated with fixed-income securities. For additional information on these and other risk considerations, please see the fund's prospectus. Before making an investment decision, you should consider all the risks associated with it. Diversification does not assure a profit or ensure against loss.

JH EZincrease® is a registered trademark of John Hancock Life Insurance Company (U.S.A.) and are used under license by John Hancock Life Insurance Company of New York.

Neither asset allocation nor diversification ensures a profit or protection against a loss. Note that an asset allocation investment option may not be appropriate for all participants, particularly those interested in directing investment options on their own

The content of this document is for general information only and is believed to be accurate and reliable as of posting date but may be subject to change. John Hancock does not provide investment, tax, or legal advice. Please consult your own independent advisor as to any investment, tax, or legal statements made herein.

Past performance is no guarantee of future results.

Group annuity contracts and recordkeeping agreements are issued by: John Hancock Life Insurance Company (U.S.A.) ("John Hancock USA"), Boston, MA (not licensed in New York) and John Hancock Life Insurance Company of New York ("John Hancock NY"), Valhalla, NY. Product features and availability may differ by state. John Hancock USA and John Hancock NY each make available a platform of investment alternatives to sponsors or administrators of retirement plans without regard to the individualized needs of any plan. Unless otherwise specifically stated in writing, John Hancock USA and John Hancock NY do not, and are not undertaking to, provide impartial investment advice or give advice in a fiduciary capacity.

NOT FDIC INSURED. | MAY LOSE VALUE. | NOT BANK GUARANTEED.

© 2022 John Hancock. All rights reserved.

GT-PS24773-GE 01/22-46596

GA012721149221



## BATTLEFIELD FIRE PROTECTION DISTRICT

[www.battlefieldfire.com](http://www.battlefieldfire.com) 

4117 W. Second Street  
Battlefield, MO 65619

FAX: (417) 887-9914  
CELL: (417) 343-4504

PHONE: (417) 881-9018



### Administration – Chief Moore

- I started my meetings with each employee regarding their pay and evaluation.
- I have been asked to represent the southside of the County (including Christian County departments) in the workgroup with Senator Trent for SB979. No new updates.
- I am working with the IAFC on a legislative workgroup specific to home oxygen therapy fire fatalities and Medicare/Medicaid reimbursement.
- Tony Reahr from Edward Jones will be here for the yearly review.
- Several of us will be attending the Missouri Fire Chiefs annual conference at Big Cedar at the end of the month.
- We reviewed our renewal for P&C Insurance for 2024. All changes were initiated by us, such as the sale or purchase of equipment and removal of fixed assets.

### Operations – Deputy Chief Reynolds

- January run statistics
  - Calls = 199
    - 14 Building fires
    - Previous year = 203
    - YTD 2024 = 199
  - Average Response = 6.40 minutes
    - YTD = 6.40 minutes
    - Target is 7.00 minutes.
  - Turnout time = 1.20
    - YTD = 1.20
    - Target is 1.30
- Lexipol on-boarding:
  - Several Policies (22) to discuss.
- **Policies that require Board Action (5)**
  - 207 – Financial Disclosure policy.** State regs cited.
  - 601 – Fire Apparatus Driver/Operator Training.** Meets state/federal regs.
  - 602 – CPR and AED Training.** Meets state/federal regs.
- Policies that require NO Board Action (17)
  - 210 – Purchasing and Procurement. No change
  - 213 – Wages and Salary Administration. No change
  - 214 – Investments. No change
  - 215 – Surplus Property. No change
  - 1014 – Work Statement. No change
  - 1050 – Leave of Absence. No change
  - 1051 – Bereavement Leave. No change
  - 1052 – Emergency Leave. No change
  - 1053 – Paid Holidays. No change

**614 – Live-Fire Training.** Meets state/federal regs.  
**1013 – Awards and Recognitions.** No change.  
Added the newly recreated form.

1055 – Reduction in Staffing. No change  
1056 – Demotions. No change  
1057 – Working Out of Grade. No change  
1058 – Wage Incentives. No change  
1059 – Employee Benefits. No change  
1060 – Discipline. No change  
1061 – Transfers. No change  
1062 – Merit Pay. No change





## **BATTLEFIELD FIRE PROTECTION DISTRICT**

[www.battlefieldfire.com](http://www.battlefieldfire.com) 

4117 W. Second Street  
Battlefield, MO 65619

FAX: (417) 887-9914  
CELL: (417) 343-4504

PHONE: (417) 881-9018



### **Support Services – Division Chief Anderson (as of 2-1-24)**

#### **Community Risk Reduction Activities**

- Total contacts made through social media, the District website and Google Business for January 2024= 60,026.
- Crews installed 6 smoke alarms, 8 batteries, and 3 bed shakers.
- Continued working on development of the District's community risk assessment.
- Attended a meeting of the SPS Children First Committee.
- Assisted the Missouri Division of Fire Safety with a Hazmat Awareness & Operations refresher course pilot presentation.
- Continued participation in the IAFC home oxygen therapy work group
- Attended a National Fire Academy presentation of Best Practices in CRR.
- Attended a leadership seminar.
- Attended a meeting of the District's CRR committee.
- Attended an NFPA meeting to develop a new Fire Officer/Instructor standard.
- Assisted the Cape Girardeau Fire Department with a Hazmat Operations course.

#### **Workers Compensation, Safety, and Human Resources**

- The District had no work comp claims for this period.
- Continued to monitor active work comp claims.
- Attended two meetings with the District's Awards Committee.
- Attended a meeting with CoxHealth Occumed to discuss billing issues.
- Attended two meetings of the District's Health and Wellness Committee.
- Attended a meeting of the District's Safety Committee.
- Attended an annual work comp audit with MEM.

### **Training – Division Chief Burr**

- Training hours for January: 1,484 hours
  - YTD Hours = 1,484 hours
    - 2023 YTD Hours = 946 hours
- I attended an Exercise Planning Workgroup meeting for Greene County OEM.
- We have not heard anything back about the SCBA grant that I submitted for.
- I met the architect to go over their concepts for the new maintenance and training facilities. They have an agreement that needs to be signed before the process can go any further.
- I received a proposal from OWN Engineering for the various civil engineering aspects of the maintenance project.
- I am waiting on one more quote for the new LP burn props.



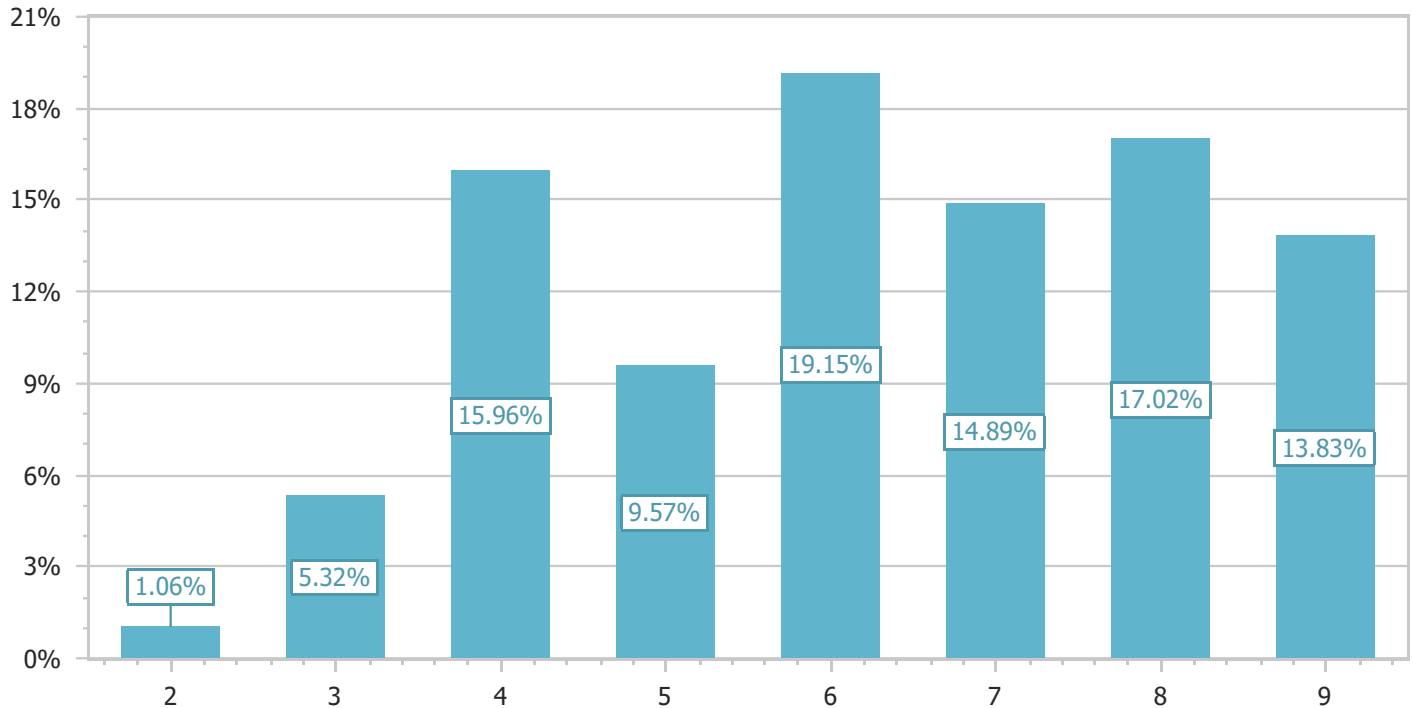
# BATTLEFIELD FIRE PROT. DIST.

4117 W. SECOND ST., BATTLEFIELD, MO 65619

OFFICE: 417-881-9018

FAX: 417-887-9914

## Incident Response Times, Summary



Incident#	Exp #	Alarm Time	Arrival Time	Response Time
2400028	0	1/5/2024 21:10		00:00:00
2400070	0	1/11/2024 18:39		00:00:00
2400188	0	1/29/2024 12:30		00:00:00
Number of Responses UNDER				Minutes: 3 (3.19%)
2400073	0	1/13/2024 12:56	1/13/2024 12:58	00:02:13
Number of Responses UNDER				3 Minutes: 4 (4.26%)
2400088	0	1/13/2024 10:26	1/13/2024 10:29	00:03:41
2400131	0	1/20/2024 04:58	1/20/2024 05:02	00:03:05

Incident#	Exp #	Alarm Time	Arrival Time	Response Time
2400170	0	1/25/2024 14:22	1/25/2024 14:25	00:03:04
2400169	0	1/25/2024 21:47	1/25/2024 21:51	00:03:29
2400179	0	1/27/2024 07:42	1/27/2024 07:45	00:03:24
<b>Number of Responses UNDER 4 Minutes: 9 (9.57%)</b>				
2400015	0	1/3/2024 10:29	1/3/2024 10:33	00:04:12
2400020	0	1/4/2024 00:50	1/4/2024 00:55	00:04:59
2400025	0	1/5/2024 15:13	1/5/2024 15:17	00:04:02
2400064	0	1/9/2024 20:16	1/9/2024 20:20	00:04:40
2400077	0	1/13/2024 13:05	1/13/2024 13:10	00:04:21
2400106	0	1/15/2024 13:32	1/15/2024 13:36	00:04:38
2400117	0	1/17/2024 08:05	1/17/2024 08:10	00:04:41
2400113	0	1/17/2024 21:51	1/17/2024 21:55	00:04:19
2400128	0	1/19/2024 10:24	1/19/2024 10:29	00:04:30
2400141	0	1/21/2024 21:55	1/21/2024 22:00	00:04:57
2400142	0	1/21/2024 22:54	1/21/2024 22:59	00:04:45
2400153	0	1/22/2024 15:36	1/22/2024 15:40	00:04:29
2400156	0	1/23/2024 08:36	1/23/2024 08:41	00:04:53
2400178	0	1/27/2024 11:31	1/27/2024 11:36	00:04:29
2400193	0	1/29/2024 19:22	1/29/2024 19:26	00:04:16
<b>Number of Responses UNDER 5 Minutes: 24 (25.53%)</b>				
2400009	0	1/2/2024 15:00	1/2/2024 15:06	00:05:47
2400012	0	1/3/2024 08:47	1/3/2024 08:53	00:05:47
2400065	0	1/10/2024 22:03	1/10/2024 22:08	00:05:35
2400087	0	1/14/2024 16:16	1/14/2024 16:22	00:05:18
2400114	0	1/18/2024 04:21	1/18/2024 04:27	00:05:13
2400138	0	1/21/2024 14:07	1/21/2024 14:12	00:05:32
2400147	0	1/21/2024 18:38	1/21/2024 18:43	00:05:50
2400151	0	1/21/2024 23:22	1/21/2024 23:27	00:05:11
2400199	0	1/30/2024 22:51	1/30/2024 22:57	00:05:59

Incident#	Exp #	Alarm Time	Arrival Time	Response Time
<b>Number of Responses UNDER 6 Minutes: 33 (35.11%)</b>				
<hr/>				
2400004	0	1/1/2024 18:12	1/1/2024 18:18	00:06:01
2400024	0	1/4/2024 18:11	1/4/2024 18:17	00:06:24
2400031	0	1/5/2024 10:06	1/5/2024 10:13	00:06:53
2400027	0	1/5/2024 18:21	1/5/2024 18:28	00:06:40
2400032	0	1/6/2024 11:03	1/6/2024 11:10	00:06:34
2400033	0	1/6/2024 18:07	1/6/2024 18:14	00:06:43
2400040	0	1/6/2024 18:50	1/6/2024 18:56	00:06:12
2400063	0	1/10/2024 20:54	1/10/2024 21:00	00:06:14
2400072	0	1/11/2024 12:22	1/11/2024 12:29	00:06:39
2400095	0	1/15/2024 06:04	1/15/2024 06:11	00:06:34
2400111	0	1/17/2024 20:04	1/17/2024 20:10	00:06:15
2400119	0	1/18/2024 15:10	1/18/2024 15:16	00:06:05
2400127	0	1/18/2024 20:51	1/18/2024 20:57	00:06:43
2400154	0	1/22/2024 17:28	1/22/2024 17:34	00:06:24
2400157	0	1/23/2024 18:22	1/23/2024 18:28	00:06:16
2400160	0	1/24/2024 14:48	1/24/2024 14:55	00:06:58
2400166	0	1/25/2024 19:49	1/25/2024 19:56	00:06:56
2400198	0	1/30/2024 19:42	1/30/2024 19:49	00:06:51
<b>Number of Responses UNDER 7 Minutes: 51 (54.26%)</b>				
<hr/>				
2400011	0	1/2/2024 23:15	1/2/2024 23:22	00:07:18
2400019	0	1/4/2024 07:41	1/4/2024 07:49	00:07:56
2400035	0	1/6/2024 16:11	1/6/2024 16:18	00:07:11
2400038	0	1/7/2024 03:40	1/7/2024 03:48	00:07:51
2400045	0	1/7/2024 18:04	1/7/2024 18:12	00:07:25
2400054	0	1/8/2024 19:23	1/8/2024 19:30	00:07:27
2400089	0	1/14/2024 13:42	1/14/2024 13:50	00:07:51
2400110	0	1/17/2024 12:06	1/17/2024 12:13	00:07:34
2400123	0	1/18/2024 22:47	1/18/2024 22:54	00:07:36
2400177	0	1/26/2024 19:13	1/26/2024 19:20	00:07:20

Incident#	Exp #	Alarm Time	Arrival Time	Response Time
2400183	0	1/26/2024 21:09	1/26/2024 21:17	00:07:30
2400194	0	1/30/2024 11:48	1/30/2024 11:56	00:07:17
2400200	0	1/30/2024 23:45	1/30/2024 23:53	00:07:37
2400201	0	1/31/2024 05:38	1/31/2024 05:46	00:07:49
<b>Number of Responses UNDER 8 Minutes: 65 (69.15%)</b>				

---

2400010	0	1/2/2024 20:10	1/2/2024 20:18	00:08:08
2400050	0	1/8/2024 09:33	1/8/2024 09:41	00:08:18
2400055	0	1/8/2024 22:10	1/8/2024 22:19	00:08:59
2400057	0	1/9/2024 06:25	1/9/2024 06:33	00:08:01
2400071	0	1/12/2024 17:27	1/12/2024 17:36	00:08:58
2400102	0	1/15/2024 18:24	1/15/2024 18:32	00:08:36
2400109	0	1/16/2024 22:12	1/16/2024 22:20	00:08:24
2400112	0	1/17/2024 21:28	1/17/2024 21:37	00:08:33
2400121	0	1/18/2024 19:45	1/18/2024 19:53	00:08:27
2400133	0	1/19/2024 18:39	1/19/2024 18:47	00:08:27
2400152	0	1/22/2024 16:44	1/22/2024 16:53	00:08:36
2400159	0	1/23/2024 07:49	1/23/2024 07:57	00:08:16
2400158	0	1/24/2024 09:24	1/24/2024 09:32	00:08:15
2400163	0	1/24/2024 23:06	1/24/2024 23:14	00:08:19
2400175	0	1/26/2024 19:13	1/26/2024 19:22	00:08:47
2400202	0	1/31/2024 03:07	1/31/2024 03:15	00:08:30

**Number of Responses UNDER 9 Minutes: 81 (86.17%)**

---

2400037	0	1/7/2024 03:06	1/7/2024 03:16	00:09:12
2400046	0	1/8/2024 03:42	1/8/2024 03:51	00:09:41
2400069	0	1/12/2024 11:46	1/12/2024 11:55	00:09:23
2400162	0	1/25/2024 03:49	1/25/2024 03:59	00:09:13
2400165	0	1/25/2024 21:03	1/25/2024 21:12	00:09:00
2400167	0	1/26/2024 10:21	1/26/2024 10:30	00:09:05
2400195	0	1/30/2024 04:02	1/30/2024 04:12	00:09:31

Incident#	Exp #	Alarm Time	Arrival Time	Response Time
Number of Responses UNDER 10 Minutes: 88 (93.62%)				
2400039	0	1/5/2024 19:17	1/5/2024 19:28	00:10:49
2400067	0	1/12/2024 01:24	1/12/2024 01:35	00:10:28
Number of Responses UNDER 11 Minutes: 90 (95.74%)				
2400051	0	1/8/2024 12:54	1/8/2024 13:07	00:12:48
2400096	0	1/15/2024 04:42	1/15/2024 04:54	00:12:21
Number of Responses UNDER 13 Minutes: 92 (97.87%)				
2400197	0	1/29/2024 14:42	1/29/2024 15:01	00:19:13
Number of Responses UNDER 20 Minutes: 93 (98.94%)				
2400083	0	1/14/2024 08:27	1/14/2024 08:48	00:20:45
Number of Responses UNDER 21 Minutes: 94 (100.00%)				
Average Response Time				6.40

Incident#	Exp #	Alarm Time	Arrival Time	Response Time
-----------	-------	------------	--------------	---------------

<b>Report Filter Settings</b>
-------------------------------

**Report File Name:** Incident Response Times, Summary

**Filter Name:** Monthly Response

**Filter Expression:** ([AlarmDateTime] is between '1/1/2024 00:00' and '1/31/2024 23:59') And ((  
[Emergent] equals 'True') And ([DistrictID] in '1', '2', '3', '4'))

# AWARDS AND RECOGNITIONS

## 1013.1 PURPOSE AND SCOPE

Best Practice MODIFIED

The purpose of this policy is to provide guidelines for reporting and collecting reports of exceptional public service and for the evaluation and process for district awards.

## 1013.2 POLICY

Best Practice

It is the goal of the Battlefield Fire Protection District to recognize members through an awards system for exceptional performance.

## 1013.3 PROCEDURES

Best Practice MODIFIED

Community and district members may report acts of exceptional public service through any district supervisor.

The District will establish an "Awards Committee" of no less than three members. At a minimum, the committee shall have a chief officer, company officer, and firefighter as members. Any meetings will be posted and recorded in compliance with applicable open meetings laws.

The Awards Committee shall have the authority to present the Medal of Valor, Distinguished Service Medal, and Meritorious Service Award. The Award of Commendation, Fire Chief's Award, Unit Award, and Green Sheet may be awarded at the discretion of the Fire Chief. To be eligible for any award, the nominees must have acted per applicable regulations. Employees' actions must be submitted for review through the appropriate chain of command using the "Green Sheet" form listed in this policy.

[See attachment: Green Sheet Fillable.pdf](#)

### 1013.3.1 TYPES OF AWARDS

Best Practice MODIFIED

The types of awards offered by the Battlefield Fire Protection District include:

- (a) There are seven (7) separate awards for the recognition of commendable performance. These are awarded when commendable acts are performed and properly reported.
  1. Medal of Valor - The Medal of Valor award shall be awarded to a district member who dies or becomes injured in the line of duty and the circumstances indicate the member performed an exceptionally valorous act distinguished by extraordinary heroism and/or performance. When appropriate, the specific citizen(s) impacted by the member's actions should be extended the opportunity to present the award.



# Battlefield Fire Protection District

## Policy Manual

### AWARDS AND RECOGNITIONS

---

2. Distinguished Service Medal - The Distinguished Service Medal shall be awarded to any district member who performs an exceptional act after being aware of great personal danger before initiating the act, but who performs in a commendable manner. When appropriate, the specific citizen(s) impacted by the member's actions should be extended the opportunity to present the award. Committee members reviewing a recommendation for the Distinguished Service Medal should consider the relevant facts of the incident prompting the recommendation including but not limited to weather, time of day, level of risk above the limits of the member's PPE and equipment, specific hazardous conditions at the incident, and the status of and/or risk to the victim.
  3. Award of Commendation - The Award of Commendation may be awarded to any individual District member for emergency or non-emergency actions that significantly improved the quality of service and/or public image of the District and conspicuously distinguished the individual District member.
  4. Meritorious Service Award - The Meritorious Service Award may be awarded to a team, group, or committee for an exceptional contribution to the progress of the District or extraordinary performance. The specific events prompting the recommendation for this award must have occurred while the member served with the District as a volunteer or full-time employee.
  5. Fire Chief's Award - The Fire Chief's Award may be awarded at the discretion of the Fire Chief to a citizen or District member displaying courageous or conspicuous acts of service to another citizen, a District member, or the community. Consideration for this award shall be given when the specific details of the actions fall outside the parameters of other awards in this policy.
  6. Unit Award - The Unit Award may be awarded to any organization, unit, or specially constituted team within the District, which has worked together toward a common goal. The Award may be presented for specific performance of exceptional quality or continued professional performance and dedication to duty by the organization, unit, or team. When appropriate, the specific citizen(s) impacted by the organization, unit, or team's actions should be extended the opportunity to present the award.
  7. Green Sheet - The Green Sheet shall be presented to personnel for actions beyond normal day-to-day duties and operations that bring credit to the District. Such actions may include but are not limited to providing special assistance to a citizen or acts of kindness from distinguished behavior resulting in a positive outcome that distinguishes the member, crew and/or District.
- (b) Years of Service - Awards for years of service will be given for 5, 10, 15, 20, and 25 years of service. The years of service will be calculated on the individual's total years of service. Individuals will be credited for service time with other departments. The individuals will be given a certificate and ribbon for each benchmark. For each consecutive benchmark the ribbon will have a silver star and, upon completion of 20 years, will display one gold star on the ribbon with a silver star for every five years of service until another 20 years. Plaques will be given in addition to the certificates for 20 & 25 years of service. In addition to the certificates, ribbons, and plaques, a

# Battlefield Fire Protection District

## Policy Manual

### AWARDS AND RECOGNITIONS

---

gold Maltese cross may be displayed on the sleeves of the uniform coat near the wrist opening. A gold Maltese cross will represent five years of service.

- (c) Retirement Recognition - Employees are eligible to receive awards upon retirement after completion of 10, 15, 20, 25, & 30 years of service. These awards will be selected by the awards committee, if established, or the Fire Chief's designee.

#### 1013.3.2 FIREFIGHTER OF THE YEAR

##### Agency Content

The *Firefighter of the Year* award recognizes an employee for outstanding performance, dedication to the community, training, and any other action distinguishing the District member. This award is given annually to the one individual who best exemplifies the characteristics of a firefighter and who has an outstanding record of fire service achievements. These characteristics encompass all aspects of loyalty, productivity, dedication, and professional service. All ranks of the District are eligible.

The candidate should be the epitome of a firefighter. The candidate should be a true community leader who is involved in the right activities for the right reasons. This is not an award for heroism. It is intended to honor an individual who has given selflessly of themselves to the community and the District. The nominee must meet the following criteria:

**DEDICATION** - The individual has demonstrated the highest degree of dedication and participation to activities within the District, including training, fire response, public education, and other operations.

**LOYALTY** - The individual has demonstrated an allegiance to the District, its firefighters, and its officers. The individual is a team player that supports other's efforts to achieve the goals of the fire service, supports fire districts policies, engaging only in constructive criticism that will lead to improvements in the department.

**PRODUCTIVITY** - Has gone well beyond the duties of their District position to make clearly visible improvements that have enhanced the District's ability to reduce fire losses and better serve its community.

**PROFESSIONALISM** - Performs their duties in a manner that exemplifies the level of competency that all firefighters should strive to achieve and which reflects the highest standards of the fire service. Depending upon the circumstance, the individual regularly demonstrates the ability to lead and follow.

This award will not be awarded if suitable nominees are not submitted.

#### 1013.3.3 SUBMITTING AWARD NOMINATIONS

##### Best Practice MODIFIED

Any member may report, in writing, to any supervisor, the exemplary performance of another member.

Any member of the public may submit a nomination in writing during normal business hours, and submitting it to the Administration Division.

## AWARDS AND RECOGNITIONS

---

Complete nominations and substantiating paperwork must be received by January 14th of each year for the awards committee consideration. Discretionary award nominations are occurrence-based.

### 1013.3.4 AWARD CRITERIA, APPROVAL AND PRESENTATION

**Best Practice** **MODIFIED**

Each report and nomination should be reviewed for merit and further investigated, if necessary, for additional factual details. In determining factual details, resources that may be used include, but are not limited to, copies of audio or video recordings, copies of incidents, or interviews with additional members or witnesses.

Each report and nomination should be evaluated on its own merit, with the following criteria as a guideline:

- (a) If a report or nomination is determined to be for individual performance expected during the normal course of a member's assigned job duties, the review committee may elect to present the member with a copy of the report and nomination and place a copy in the member's personnel file. A Battalion Chief should approve this presentation. A supervisor should present the letter to the member in the presence of the company or station members.
- (b) If a nomination is determined to be for individual performance beyond what is expected during the normal course of a member's assigned job duties, the review committee may choose to have a Letter of Appreciation drafted to the member, for the Fire Chief's signature, detailing the specifics of the incident and how the member excelled. A Battalion Chief should approve this award before sending the letter to the Fire Chief for signature. The Battalion Chief should present the Letter of Appreciation to the member in the presence of the company or station members.
- (c) If an award nomination is determined to be for team performance beyond what is expected during the normal course of a company's assigned job duties, the review committee may elect to have a Company Citation drafted to the company, for the Fire Chief's signature, detailing the specifics of the incident and how the company excelled. A Battalion Chief should approve this award before sending the letter to the Fire Chief for signature and should present the letter to the company in the presence of other members of the battalion, if practicable.
- (d) If an award nomination is determined to be for individual or team performance well beyond what is expected during the normal course of assigned job duties, the review committee may elect to have a Commendation drafted for the Fire Chief's signature, detailing the specifics of the incident and how the individual or team excelled. The Fire Chief should approve this award. The Fire Chief should present this award, at his/her discretion, in a manner befitting the circumstances.
- (e) If an award nomination is determined to be for individual or team performance extraordinarily beyond what is expected during the normal course of assigned job duties, such as life-saving at significant risk of injury or death to the member, the review committee may elect to have a Meritorious Service Award or Life-Saving Award

# Battlefield Fire Protection District

## Policy Manual

### AWARDS AND RECOGNITIONS

---

conferred by the Fire Chief. The Fire Chief should approve this award. This award should typically be conferred publicly, at the discretion and direction of the Fire Chief.

- (f) If an award is given more than once to a single person, a silver star will be placed on the ribbon and on the medal ribbon until five subsequent awards have been given. After four subsequent awards, a gold star will be placed on the ribbon to indicate five awards.

#### 1013.4 REVIEW DISPOSITIONS

**Best Practice** **MODIFIED**

The review committee should review award reports and nominations. Each nomination should be given a disposition of:

- (a) Reviewed and denied. The reason for denial must accompany the copy of the nomination placed in the member's file.
- (b) Reviewed and changed. The reason for alteration must accompany the copy of the nomination placed in the member's file.
- (c) Reviewed and approved.

Once the disposition has been decided, all signatures will be applied to the green sheet. Signatures from recipients of awards which are given annually can be obtained after the award has been delivered.

#### 1013.5 AWARDS AND RECOGNITION MATRIX

**Agency Content**

The below matrix identifies the type of award, the composition of the award, and the presentation method.

Medal of Valor	X	X	X	X		Annual Banquet
Distinguished Service Medal	X	X	X	X		Annual Banquet
Award of Commendation	X	X	X	X		Annual Banquet
Meritorious Service Award		X	X	X		Annual Banquet
Fire Chief's Award		X	X	X		Annual Banquet
Unit Award		X	X	X		Annual Banquet
Green Sheet		X				Designated Occurrence

# Battlefield Fire Protection District

## Policy Manual

### AWARDS AND RECOGNITIONS

---

5 Year Service Award		X		X		Annual Banquet
10 Year Service Award		X		X	1 Silver	Annual Banquet
15 Year Service Award		X		X	2 Silver	Annual Banquet
20 Year Service Award		X		X	1 Gold	Annual Banquet
25 Year Service Award		X	X	X	1 Gold and 1 Silver	Annual Banquet
30 Year Service Award		X	X	X	1 Gold and 2 Silver	Annual Banquet
35 Year Service Award		X	X	X	1 Gold and 3 Silver	Annual Banquet
40 Year Service Award		X	X	X	2 Gold	Annual Banquet
Firefighter of the Year		X	X	X		Annual Banquet

#### 1013.6 BOARD APPROVAL

##### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

## Attachments

## Green Sheet Fillable.pdf



# BATTLEFIELD FIRE PROTECTION DISTRICT



## Green Sheet

### Employee Information

Employee:

Date:

Type of Action: ☐ Recognition (Green Sheet only)

☐ Award Nomination (see box below)

Rank:

Supervisor:

Shift:

### Type of Action

- ☐ Above Standard Work ☐ Good Samaritan ☐ Customer Service  
☐ Self-Initiated Activity ☐ Professional / Personal Development

Related to incident: Yes ☐ No ☐ Inc #:

### Award Nomination Recommendation

Boxes marked below will trigger a review by the awards committee only after it has been reviewed by the chain of command

- ☐ Unit Award ☐ Meritorious Service Award  
☐ Award of Commendation ☐ Distinguished Service Medal  
☐ Medal of Valor

### Details

Description of Action: This space is intended for a brief description only.

Justification of award: If nominated for an award, use this space to describe how it meets the criteria.

### Acknowledgement of Receipt of Green Sheet

Signatures below indicate that the documentation of actions listed above has been routed through the appropriate chain of command.

Author's Signature

Date

Supervisor Signature

Date

Battalion Chief / Division Chief

Date

Deputy Chief

Date

Award Committee

Date

Fire Chief

Date



# Bereavement Leave

## 1051.1 POLICY

### Agency Content

Full-time employees of the District may be granted a maximum of forty-eight (48) working hours leave as needed in the event of the death of a person in the employee's family. Any additional time off for funeral leave may be taken as vacation or leave without pay. This provision shall be handled on a case-by-case basis depending on the distance of travel, the relationship between employee and deceased family member, and subject to the Fire Chief or designee's approval.

"Immediate Family" shall include spouse, child, parent, mother, father, grandparents, grandchild, father-in-law, mother-in-law, legal guardian, other persons who are dependent upon the employee for their care and maintenance, and in emergency cases brother, sister, and fiancé. This list may be expanded on a case-by-case basis, when approved by a Chief Officer, under circumstances that would be impractical to deny the employee their attendance to the family member.

## 1051.2 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# CPR and Automated External Defibrillator Training

## 602.1 PURPOSE AND SCOPE

State

The purpose of this policy is to establish the training requirements for members to maintain the current and valid certificate that is required to perform CPR and to utilize an Automated External Defibrillator (AED).

### 602.1.1 DEFINITIONS

State

Definitions related to this policy include:

**Automated External Defibrillator (AED)** - An external defibrillator capable of cardiac rhythm analysis and that will charge, with or without further operator action, and deliver a shock after electronically detecting and assessing ventricular fibrillation or rapid ventricular tachycardia.

**Qualified instructor** - An individual who is qualified by the American Heart Association (AHA), American Red Cross (ARC), or an equivalent recognized entity by the Missouri Department of Health and Senior Services to teach AED/CPR (19 CSR 30-40.331).

## 602.2 POLICY

State

It is the policy of the Battlefield Fire Protection District that all members whose duties include the use of an AED or the performance of CPR shall receive initial and recertification training to maintain the current and valid certificate that is required to utilize such equipment and/or skills. Initial training and recertification will consist of AHA, ARC or the recognized equivalent approved courses and will be provided by qualified instructors at the level appropriate to the certification of the member (§ 190.1005, RSMo; 19 CSR 30-40.331).

## 602.3 REQUIREMENTS

State MODIFIED

CPR and AED training should include (§ 190.092, RSMo; § 190.1005, RSMo):

- Proper use, maintenance, periodic inspection, and testing of the AED, according to the manufacturer's specifications.
- The importance of CPR, defibrillation, Advanced Life Support (ALS), adequate airway care and internal emergency response system, if applicable.
- Assessment of an unconscious patient to include evaluation of the airway, breathing and circulation to determine cardiac arrest.
- The administration of CPR, obstructed airway, and other health care provider CPR curriculum skills.

# Battlefield Fire Protection District

## Policy Manual

### *CPR and Automated External Defibrillator Training*

---

- Information relating to AED safety precautions to enable the administration of a shock without jeopardizing the safety of the patient, rescuers, or other nearby persons.
- Recognition that an electrical shock has been delivered to the patient and that the defibrillator is no longer charged.
- Rapid, accurate assessment of the patient's post-shock status.
- The appropriate continuation of care following a successful defibrillation.

In order to be authorized to perform CPR and utilize the defibrillator, an individual shall pass a written and skills examination with a pre-established standard. The skills test measures the ability to evaluate and manage the conditions listed above.

All CPR and AED training provided by the District shall be approved and monitored by the Medical Director, who shall also approve the AED/CPR protocol and any written and skills examinations required for course completion. The Department of Health and Senior Services shall approve AED instructors and designate public safety AED service providers (19 CSR 30-40.331).

#### **602.4 TRAINING RECORDS**

**State**

The Division Chief of Training shall be responsible for maintaining records of all CPR and AED training provided to members, in accordance with Missouri regulations (19 CSR 30-40.331(1)(J)). Records should include, but are not limited to:

- (a) The location and dates of the training sessions.
- (b) The title of the session and beginning and ending times of the session.
- (c) A list of the topics or a summary of the content of the training sessions.
- (d) The names or other identifiers and job titles of the members who received the training.
- (e) The names, certificate numbers and qualifications of the persons conducting the training.

The Division Chief of Training should maintain the training records in accordance with established records retention schedules.

#### **602.5 MANDATORY REPORTING**

**State**

**MODIFIED**

The Medical Director shall have the authority to collect and record AED use data from district-approved reports. Those reports shall be maintained for a minimum of five years and shall be available for inspection by the Department of Health and Senior Services any time during reasonable business hours (§ 190.175, RSMo).

# Battlefield Fire Protection District

## Policy Manual

### *CPR and Automated External Defibrillator Training*

---

#### **602.6 BOARD APPROVAL**

##### **Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Demotions

## 1056.1 POLICY

**Agency Content**

- (a) Employees, if qualified, may request a voluntary demotion to a position with a lower rate of pay. Pay rate adjustments will be commensurate with the employee's qualifications at the new level.
- (b) Employees may also be demoted through the disciplinary process. Pay rates, if any, will be adjusted to the new level.

## 1056.2 BOARD APPROVAL

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Discipline

## 1060.1 PURPOSE AND SCOPE

### Agency Content

This section shall define and govern the usual and general types of disciplinary actions the District may use in administrating its personnel.

## 1060.2 POLICY

### Agency Content

All employees of the District except as hereinafter provided shall be subject to the provisions of these sections;

- Members of the Board of Directors
- Fire Chief
- Persons employed to render professional or technical services
- Members of appointed boards, commissions, or committees
- Persons hired to perform temporary or contract services or labor, or persons drafted for service in time of emergency or disasters.

## 1060.3 DISCIPLINARY LEVELS

### Agency Content

- (a) In administering policy and procedure the District may utilize the following types of actions, as deemed necessary and appropriate.
- (b) **Coaching/Counseling Sessions;** as personnel are coached or counseled through issues the administering supervisor shall document the session.
  1. These sessions may be used as supporting instances for further disciplinary actions.
  2. These sessions do not require an employee's signature, as they are an explanation of the session from the supervisor's point of view.
  3. If these sessions are used as supporting items for a reprimand they shall be attached to the reprimand and presented in conjunction with the reprimand.
  4. If a coaching/counseling session is performed as a follow up to a reprimand then the documented session shall be signed by the employee and placed with the original reprimand.
- (c) **Oral Reprimand;** on the first offense, where the infraction is not a serious enough nature to immediately initiate more stringent disciplinary actions, a verbal warning may be given to the employee.
  1. For purposes of letting the individual know that it is an official warning, the supervisor shall state "This is a verbal warning" and the warning must be documented as such.

# Battlefield Fire Protection District

## Policy Manual

### *Discipline*

---

2. The verbal warning shall remain in the employee's personnel file for one (1) year.
- (d) **Letter of Reprimand;** where the infraction is a repeat of a verbal warning or of a more serious nature a letter of reprimand may be given to the employee.
  1. A written statement from the Supervisor, stating specifically the conduct, omission, or neglect of duty of the employee warranting this action shall be prepared.
  2. The letter of reprimand shall be kept in the employee's personnel file for two (2) years.
- (e) **Suspension;** the infraction is repeated or of a serious nature a suspension may be given to the employee.
  1. Any Chief Officer may initiate the suspension of an employee, with pay.
  2. A written statement from the Chief Officer shall be prepared for the Fire Chief, stating specifically the conduct, omission, or neglect of duty of the employee warranting this action.
  3. If, due to the circumstances, it is imperative that the employee be removed from the work place, the Fire Chief may suspend the employee, not to exceed two (2) shifts, without pay until such time that the Board of Directors can meet.
  4. If a suspension involves a non-shift employee the maximum suspension without board approval is five (5) working days.
  5. If the board is unable to convene within the time frame, approval from two (2) board members must be obtained to extend the suspension without pay.
  6. The suspension shall be kept in the employee's personnel file for three (3) years.
- (f) **Demotion;** involves an involuntary change of the employee's duties or classification, which may result in a loss of monetary compensation.
  1. Notice of an involuntary demotion shall be kept in the employee's personnel file for three (3) years.
- (g) **Discharge;** involves permanent termination of the employee from the District.

#### 1060.4 DISCIPLINARY PROCESS

##### **Agency Content**

- (a) All disciplinary statements, records, and documents must be signed and dated by the employee and supervisor issuing the disciplinary action before they go into the employee's personnel file.
  1. If an employee refuses to sign the documentation the supervisor shall state such on the documentation. The supervisor should if possible obtain a witness to such a refusal.
  2. All parties involved must sign and date the documentation.

# Battlefield Fire Protection District

## Policy Manual

### *Discipline*

---

3. All documentation shall be expunged from the employee's personnel file upon the expiration date as set forth by the offense, as long as the issue is completely corrected.
- (b) Oral Reprimand; the employee shall be advised they are receiving a verbal warning and it shall be documented as such.
  1. The employee may submit in writing a response to the verbal warning.
  2. The response must be submitted within seven (7) days of receiving the verbal warning.
  3. All responses related to the oral reprimand shall be placed in the employee's file.
- (c) Letter of Reprimand; the employee shall be delivered a copy of the letter of reprimand.
  1. The employee may submit in writing a response to the letter of reprimand.
  2. The response must be submitted within seven (7) days of receiving the letter of reprimand.
  3. All responses related to the letter of reprimand shall be placed in the employee's file.
- (d) Suspension; if the act or omission occurs while the employee is on duty, or because of circumstances surrounding any infraction or alleged infraction, it may be important to relieve the employee from active duty until any final determination can be made.
  1. Any Chief Officer may suspend an employee with pay.
  2. If due to serious circumstance the employee must be removed the Fire Chief may suspend the employee a maximum of two (2) shifts without pay.
  3. If a suspension involves a non-shift employee the maximum suspension without board approval is five (5) working days.
  4. If the board is unable to convene within the time frame, approval from two (2) board members must be obtained to extend the suspension without pay.
  5. The employee shall be provided a written statement outlining the specific conduct, omission, or neglect of duty and the duration of the suspension.
  6. The employee shall have seven (7) days, from the date of his/her receipt of the written statement to submit a written response to the suspension.
  7. All responses related to the suspension shall be placed in the employee's file.
- (e) Demotion; an infraction is repeated or of a serious nature a demotion may be given to the employee.
  1. The employee shall be provided a written statement outlining the specifics of the demotion.
  2. The employee shall have seven (7) days from the date of receipt of the statement to submit a written response to the demotion.
  3. All responses related to the suspension shall be placed in the employee's file.



# Battlefield Fire Protection District

## Policy Manual

### *Discipline*

---

- (f) Discharge; the Board of Directors shall conduct all actions in regards to discharging an employee.
  - 1. The Board's decision shall be provided to the employee in writing.
  - 2. Upon receiving the notice of discharge the employee, within seven (7) days, submit a written response.
  - 3. This response may include a request for a Hearing before the Board of Directors.

#### **1060.5 REQUESTS FOR REVIEW**

##### **Agency Content**

An employee may request an audience or review with the next level of supervision to determine if the level of discipline or action taken was appropriate if the employee does not agree with the level of discipline or the convening of the disciplinary process. A decision made by the Board of Directors is final and cannot be reviewed as the highest level of supervision is the Board of Directors.

#### **1060.6 BOARD APPROVAL**

##### **Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Disclosure of Financial Interest

## 207.1 PURPOSE AND SCOPE

### Best Practice

The purpose of this policy is to provide a uniform method for complying with Missouri law and the requirements for filing a financial interest statement (§ 105.483, RSMo; § 105.485, RSMo).

## 207.2 POLICY

### State

Designated members of the District shall comply with state requirements regarding the filing of financial interest statements with the District.

## 207.3 DISTRICT RESPONSIBILITIES

### State

The Fire Chief shall designate a person to be the Conflict of Interest Filing Officer for the District, who shall be responsible for administering the filings including ensuring timely compliance and maintaining a list of all district members who are required to file a statement (§ 105.483, RSMo; § 105.487, RSMo).

All financial interest statements shall be screened for compliance and potential conflict of interests by the Conflict of Interest Filing Officer. Members in designated classifications are required to disclose certain financial interests, which may include investments, interests in real property, income and business interests (§ 105.485, RSMo).

## 207.4 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

---

# Emergency Leave

## 1052.1 POLICY

### Agency Content

In the event of a family emergency, employees shall be released from work by their immediate supervisor, with the Battalion Chief's approval, for all or part of a shift to attend to the matter. The emergency time off shall be charged to vacation or sick leave at the employee's discretion.

## 1052.2 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Employee Benefits

## 1059.1 POLICY

### Agency Content

The District tries to maintain a comprehensive insurance program for its full time employees comprised of health, dental, and life insurance. To be eligible for any health care insurance there is a sixty (60) day waiting period for eligible employees. The employee shall establish coverage through the District office representative.

## 1059.2 HEALTH INSURANCE

### Agency Content

It is the District's policy to provide the employee's portion of the health care insurance. If family coverage is desired, the employee must establish this coverage at his or her own expense.

## 1059.3 DENTAL

### Agency Content

Included in health care benefits is dental coverage. The District provides the employee's portion of the dental insurance. If family coverage is desired, the employee must establish this coverage at his or her own expense.

## 1059.4 LIFE INSURANCE

### Agency Content

The District provides Life Insurance, for the employee in the amount of twenty thousand (20,000) dollar coverage. Should the employee wish to obtain more coverage or family coverage they must contact the insurance carrier and establish the additional coverage at their own expense.

## 1059.5 SHORT TERM DISABILITY

### Agency Content

The District provides a short term disability plan for each employee. The short term insurance is used to cover illness or injury not covered by workers compensation benefits.

## 1059.6 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors ON

# Fire Apparatus Driver/Operator Training

## 601.1 PURPOSE AND SCOPE

Best Practice MODIFIED

The purpose of this policy is to enhance the safety of members and the public by ensuring that all Battlefield Fire Protection District members, including tiller operators, who operate firefighting apparatus and emergency vehicles as part of their duties, receive appropriate training.

### 601.1.1 DEFINITIONS

State

Definitions related to this policy include:

**Emergency Vehicle** - Any district vehicle designed and equipped to respond to an emergency, such as any fire apparatus, ambulance, command vehicle, or other specialized vehicle, and that possesses an operating blue or red light and siren for purposes of providing warning; any member-owned vehicle that is properly equipped with authorized warning devices and has been issued a written permit by the Fire Chief or his/her designee (§ 304.022(4), RSMo; § 307.175, RSMo).

**Firefighting apparatus** - Vehicles designed for the purpose of firefighting. This includes pumpers, ladder trucks and aerial devices, tiller trucks, and wildland firefighting, aircraft rescue firefighting (ARFF) and mobile water supply (water tender) units.

**Tiller operator** - The driver of the rear free-axle portion of a ladder truck.

## 601.2 POLICY

State

It is the policy of the Battlefield Fire Protection District that all members who operate any emergency vehicles should successfully complete the appropriate operator training that meets or exceeds the applicable requirements of the National Fire Protection Association (NFPA) standard for the types of vehicles operated, or the Missouri State Fire Marshal Division of Fire Safety Driver/Operator Certification Program.

## 601.3 REQUIRED AND RECOMMENDED TRAINING

State MODIFIED

All members who operate firefighting apparatus, including tiller operators, should have certification and training validating competent operational and driving skills consistent with NFPA 1002, 2009 edition or the Missouri State Fire Marshal Division of Fire Safety's Fire Apparatus Driver/Operator Certification Program. Completion of the District's Driver Operator Task Book meets this requirement.

Training should include written, oral and practical evaluations to demonstrate proficiency. The Division Chief of Training shall annually audit and update driver/operator training materials to ensure compliance with local, state and federal requirements.

# Battlefield Fire Protection District

## Policy Manual

### *Fire Apparatus Driver/Operator Training*

---

#### **601.4 DIVISION CHIEF OF TRAINING RESPONSIBILITIES**

**Best Practice** **MODIFIED**

It shall be the responsibility of the Division Chief of Training to ensure that any member required to drive fire apparatus as a part of his/her normal duties has received all training required for competent, safe operation of the apparatus. The Division Chief of Training shall coordinate with the district member appointed to monitor driver license status to ensure members have valid driver licenses, in accordance with the policy.

#### **601.5 BOARD APPROVAL**

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Investments

## 214.1 OBJECTIVES

### Agency Content

The investment policy of the Battlefield Fire Protection District shall be to:

- (a) Ensure the safety of the invested funds of the Fire District.
- (b) Maintain sufficient liquidity to provide adequate and timely working funds.
- (c) Attain the highest possible rate of return while providing necessary protection of principal consistent with Fire District operating requirements as determined by the Board.
- (d) Match the maturity of investment instruments to the daily cash flow requirements.
- (e) Diversify investments as to maturity, instruments, and financial institutions where permitted under state law.
- (f) Actively pursue portfolio management techniques.
- (g) Avoid investment for speculation.

## 214.2 AUTHORIZED INVESTMENTS

### Agency Content

### (a) AGREEMENTS

- 1. The Board of Directors President or designee shall serve as the investment officer of the Fire District and invest Fire District funds in legally authorized and adequately secured investments.
- 2. To ensure the accomplishment of the policy and the objectives listed, the investment officer of the Fire District is authorized to invest the various funds of the Fire District in legally authorized and adequately secured certificates of deposit and/or Bank Money Market accounts with a maximum maturity of 12 months.
- 3. No other investments shall be made without approval of a majority of the Board.

### (b) CERTIFICATES OF DEPOSIT

- 1. Bids for certificates of deposit may be solicited orally, in writing, electronically, or in any combination of those methods.

## 214.3 SAFETY AND INVESTMENT MANAGEMENT

### Agency Content

The investment officer shall exhibit prudence and discretion in the selection and management of securities. Skill and judgment shall be exercised in order that no individual or group of transactions undertaken would jeopardize the total capital sum of the overall portfolio. The Fire District shall not allow speculation (such as anticipating an appreciation of capital through changes in market interest rates) in the selection of any investments. The investment officer shall observe financial

## *Investments*

---

market indicators, study financial trends, and utilize available educational tools in order to maintain appropriate managerial expertise.

### **214.4 LIQUIDITY AND DIVERSITY**

#### **Agency Content**

To meet the investment objectives of the Fire District, the maturity of investments shall be targeted to coincide with the cash flow needs of the District. Assets of the Fire District shall be invested in instruments whose maturities do not exceed one year at the time of purchase. The investment portfolio shall be diversified to reduce the risk of loss of investment income from over-concentration of assets in a specific issue, a specific issue size, or a specific class of securities.

Nevertheless, the Fire District recognizes that in a diversified portfolio, occasional measured losses are inevitable, and must be considered within the context of the overall portfolio's investment return. Also, it is intended that investments in all funds shall be managed in such a way that any market price losses resulting from interest-rate volatility shall be offset by income received from the balance of the portfolio during a 12-month period.

### **214.5 INTERNAL CONTROLS**

#### **Agency Content**

A system of internal controls shall be documented in writing. Also, they shall be designed to prevent losses of public funds arising from fraud, employee error, and misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees and officers of the Fire Protection District. Controls deemed most important shall include:

- (a) Control of collusion.
- (b) Separation of duties.
- (c) Separation of transaction authority from accounting and record keeping.
- (d) Custodial safekeeping.
- (e) Avoidance of bearer-form securities.
- (f) Clear delegation of authority.
- (g) Specific limitations regarding securities losses.
- (h) Written confirmation of telephone transactions.
- (i) Limiting the number of authorized investment officials.
- (j) Documentation of transactions and strategies.

These controls shall be reviewed by the Fire Protection District's independent auditing firm.

### **214.6 SAFEKEEPING AND CUSTODY**

#### **Agency Content**



## *Investments*

---

To protect against potential fraud and embezzlement, the cash and investments of the Fire District shall be secured through third-party custody and safekeeping procedures as designated by the Fire District. Investment officials shall be bonded.

### **214.7 BROKERS / DEALERS**

Agency Content

N/A

### **214.8 INTEREST RATE RISK**

Agency Content

To reduce exposure to changes in interest rates that could adversely affect the value of investments, the Fire District shall use final and weighted-average-maturity limits and diversification.

### **214.9 MONITORING MARKET PRICES**

Agency Content

Monitoring shall be done monthly and more often as economic conditions warrant by using appropriate reports, indices, or benchmarks for the type of investment. The investment officer shall keep the Board informed of significant declines in the market value of the Fire District's investment portfolio. Information sources may include financial/investment publications and electronic media, available software for tracking investments, depository banks, commercial or investment banks, financial advisors, and representatives/advisors of investment pools or money market funds.

### **214.10 INVESTMENT STRATEGY**

Agency Content

The Fire District maintains portfolios that utilize specific investment strategy considerations designed to address the unique characteristics of the fund groups represented in the portfolios:

- (a) **Operating Funds.** Investment strategies for operating funds and comingled pools containing operating funds have as their primary objective the assurance that anticipated cash flow are matched with adequate investment liquidity. In order to accomplish this, the Fire District shall maintain adequate balances in short-term investments with necessary liquidity to ensure that sufficient funds are available for the continued operations of the Fire District. Funds shall not be invested in securities with stated maturities that exceed the reasonable expected expenditure time period.
- (b) **Debt Service Funds.** The Fire District shall maintain as its primary objective, the safety of principal with regard to all monies collected or allocated for debt service. Secondly, the Fire District shall seek to maximize the return on such funds while ensuring sufficient funds for timely payments of its debt obligations. In order to accomplish this, the Fire District shall invest such funds in amounts and maturity dates that most likely will meet the debt service requirements of the Fire District.
- (c) **Capital Improvement Fund.** The Fire District shall maintain as its primary objective, the safety of principal with regard to all monies collected. The Fire District shall seek to

# Battlefield Fire Protection District

## Policy Manual

### *Investments*

---

maximize the return of such funds, while ensuring sufficient funds for timely payments of its obligations.

- (d) Special Projects or Special Purpose Funds. Portfolios for these funds shall have as their primary objective the assurance that anticipated cash flows are matched with adequate investment liquidity. The stated final maturity dates of securities held should not exceed the estimated project completion date.

#### **214.11 BOARD APPROVAL**

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Leave of Absence

## 1050.1 POLICY

### Agency Content

Employees of the District may be granted an unpaid leave of absence not to exceed one year. However, a leave of absence shall be granted only when it will not result in undue hardship for the District, and leave shall not be granted primarily in the interest of the employee. The employee must submit a written request at least two (2) weeks in advance of the leave requested to the Fire Chief. This requirement may be waived based on the urgency of the request. After evaluation, the Fire Chief will advise the employee in writing, stating the terms and conditions of the leave of absence. Upon expiration of the approved leave, the employee shall be reinstated in the position held at the time the leave was granted. Failure on the part of an employee to report promptly on the date the leave expires, or within thirty (30) days after being notified to return to duty, shall be cause for discharge, upon final approval of the Board. Time spent on leave of absence will not be accrued as length of service. During this time period, the District will not provide benefits for the employee. However, the employee will have the option to make arrangements for the payment of monthly premiums, as provided under the amended Consolidated Omnibus Budget Reconciliation Act of 1985, (COBRA).

## 1050.2 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Live-Fire Training

## 614.1 PURPOSE AND SCOPE

Best Practice

The purpose of this policy is to protect the health and safety of members by providing guidelines and responsibilities for live-fire training.

## 614.2 POLICY

Best Practice MODIFIED

It is the policy of the District to conduct live-fire training in a safe and effective manner that meets applicable standards, policies, and local regulations.

## 614.3 MEMBER PREREQUISITES

Best Practice MODIFIED

Before participating in any live-fire training exercise, members shall, at a minimum, have completed training in the use of Personal Protective Equipment, Fire Control, and Fire Behavior, equivalent to the requirements found in NFPA 1001.

## 614.4 TRAINING CHIEF RESPONSIBILITIES

Best Practice MODIFIED

The Division Chief of Training shall be responsible for:

- (a) Scheduling live-fire training.
- (b) Confirming that the Deputy Fire Chief is notified when live-fire training is scheduled.
- (c) Ensuring that all live-fire training provided by the agency is conducted in accordance with state and local requirements.
- (d) Ensuring that all live-fire instructors have received training on the use and care of the props being used.
- (e) Providing a secure structure for the live-fire training consistent with the requirements of this policy.
- (f) Ensuring that a burn plan has been completed and reviewed before conducting any live fire training exercises.
- (g) Confirming that a sufficient number of instructors will be present for the live-fire training.
  1. In no event shall there be fewer than four instructors.
  2. There shall be no more than a 5:1 student-to-instructor ratio at any time.
- (h) Confirming that the number of instructors and instructor assignments are detailed in the burn plan.
- (i) Designating a qualified safety officer for all live-fire training exercises.

## Live-Fire Training

---

- (j) Ensuring that all live-fire training is conducted using qualified instructors who meet the following requirements:
  - 1. For the lead instructor, NFPA 1403- Live Fire Instructor in Charge and NFPA 1041 - Instructor Level 2.
  - 2. For all other instructors, NFPA 1403 - Live Fire Instructor and NFPA 1041 - Instructor Level 1.
- (k) Ensuring all injuries sustained during live-fire training are documented.

### 614.5 SAFETY OFFICER

**Best Practice**

A safety officer shall be designated for all live-fire training exercises and shall have the same qualifications as the lead instructor. The safety officer has the authority to intervene and control any aspect of the operations when a potential or actual danger, potential accident, or unsafe condition exists. The safety officer may require additional safety personnel as deemed necessary.

The safety officer shall not be assigned duties that interfere with their safety responsibilities.

The safety officer shall be knowledgeable about all the safety features at the training location.

### 614.6 TRAINING REQUIREMENTS

**Best Practice** **MODIFIED**

Before beginning any live-fire training, the designated safety officer shall be responsible for:

- (a) Inspecting all burn locations.
- (b) Ensuring that all members participating in the training meet the prerequisites for participation.
- (c) Inspecting each participant's personal protective equipment (PPE) and SCBA.
- (d) Ensuring that a pre-burn walk-through and briefing for all members and instructors has been conducted.
- (e) Ensuring that a medical group is established with personnel at an EMT level or above. an Emergency Medical Services (EMS) unit and advanced life support (ALS) crew capable of transporting a patient are on location.

In no event shall a person be used as a simulated victim during live-fire training exercises.

All structures used for live-fire training shall be inspected after use.

### 614.7 USE OF ACQUIRED STRUCTURES

**Best Practice** **MODIFIED**

Before using any acquired structure for live-fire training, the Division Chief of Training shall:

- (a) Inspect the structure to determine whether it can be made sufficiently safe for live-fire training.

# Battlefield Fire Protection District

## Policy Manual

### *Live-Fire Training*

---

- (b) Facilitate the preparation of the structure for safe use (e.g., removal of all asbestos-containing materials).
- (c) Confirm that the live-fire training will comply with all local, state, and federal regulations applicable to the open burning of buildings, including the Clean Air Act (42 U.S.C. § 7401 et seq.).
- (d) Ensuring an Emergency Medical Services (EMS) unit and advanced life support (ALS) crew capable of transporting a patient are on location.

#### **614.8 TRAINING RECORDS**

**Best Practice** **MODIFIED**

The Division Chief of Training shall be responsible for maintaining records of all live-fire training that is provided to members. At a minimum, the District should document:

- (a) The dates of the training sessions.
- (b) A list of the topics or a summary of the content of the training sessions.
- (c) The names or other identifiers and job titles of the members who received the training.
- (d) Injuries sustained during training exercises.

The Division Chief of Training should maintain the training records in accordance with established records retention schedules.

#### **614.9 BOARD APPROVAL**

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Merit Pay

## 1062.1 PURPOSE AND SCOPE

### Agency Content

The purpose of this policy is to establish requirements for merit pay for the members of the Battlefield Fire Protection District.

### 1062.1.1 DEFINITIONS

#### Agency Content

**Above Average** - On a regular basis, performance is characterized by high quality and quantity of work that exceeds most position requirements, key objectives, and management expectations. Employee demonstrates outstanding skills and abilities, and assignments are accomplished in a highly effective manner with limited guidance and direction.

**Comments** - This section is found on all of the Evaluation Forms. It is used to make additional comments regarding the performance or rating of the employee.

**Exceeds Expectations** - Performance consistently exceeds position requirements and management expectations. Resourcefulness and depth of knowledge are of the highest quality. Assignments are accomplished in an exceptional manner with minimal direction and are characterized by outstanding achievements seldom accomplished within the agency/institution.

**Eligibility Date** - Date the employee is eligible for the Merit Increase. The date will be January 1. Employees must have 12 continuous months of service to be eligible.

**Meets Expectations** - Performance meets all or most and may occasionally exceed work objectives and management expectations. Employee demonstrates good knowledge of job duties, and assignments are accomplished effectively with normal supervisory guidance.

**Merit Pay Increase System** - A merit-based pay system which incorporates pay and performance evaluation standards and establishes criteria for salary adjustments or lump sum payments for employees who meet requisite performance categories.

**Needs Improvement** - Performance does not consistently meet management expectations. Requires more than normal guidance and direction. Improvement and/or development are necessary if the rater elects to continue the incumbent's employment.

**Performance Evaluation System**- A system for comparing performance with pre-established standards of satisfactory performance. The District's performance evaluation system is located in Policy 302 and Procedure 209.

**Rater** - A person designated to supervise employees and is responsible for developing, monitoring, and evaluating performance standards and results for employees who report to them directly (subordinates). *Please Note: A rater must complete all subordinate reviews prior to being eligible for a merit pay increase based on their own performance.*

# Battlefield Fire Protection District

## Policy Manual

### *Merit Pay*

---

**Standards** - The performance standards describe in detail what is considered the satisfactory level of performance. This allows the rater to identify when an employee exceeds the standard or performs below the acceptable level of performance. The standard should be measurable, observable, realistic in terms of the job, within the employee's control, and expressed in terms of expected results.

**Task** - The smallest essential part of a job. A unit of work activity that is a logical and necessary action in the performance of a job.

#### **1062.2 POLICY**

##### **Agency Content**

It is the policy of the Battlefield Fire Protection District to recognize the value of personnel commitment and positive influence that benefits the district due to performance of employees. The District will evaluate each employee based upon performance annually and rate them according to the District's evaluation system. The awarded performance evaluation rating will determine the merit pay for each employee based upon a percentage of the employee's annual salary. The merit increase will be added to the employee's annual salary in the next budget year after the performance evaluation.

##### **1062.2.1 THE PERFORMANCE EVALUATION SYSTEM**

##### **Agency Content**

The performance evaluation system will utilize the following four (4) rating categories to determine overall scores of employee performance and award increases:

**Exceeds Expectations** - Performance consistently exceeds position requirements and management expectations. Resourcefulness and depth of knowledge are the highest quality. Assignments are accomplished in an exceptional manner with minimal direction and are characterized by outstanding achievements seldom accomplished within the agency/institution.

**Above Average** - On a regular basis, performance is characterized by high quality and quantity of work that exceeds most position requirements, key objectives, and management expectations. Employee demonstrates outstanding skills and abilities, and assignments are accomplished in a highly effective manner with limited guidance and direction.

**Meets Expectations** - Performance meets all or most and may occasionally exceed work objectives and management expectations. Employee demonstrates good knowledge of job duties, and assignments are accomplished effectively with normal supervisory guidance.

**Needs Improvement** - Performance does not consistently meet management expectations. Requires more than normal guidance and direction. Improvement and/or development are necessary if the rater elects to continue employment.

**Full-time and Part-time Employees** - To be eligible for a merit pay increase, an employee must have continuous employment in either a position in a regular, full-time or part-time position for 12 months. An employee is defined as one who has had continuous employment since their Date of Hire to their first anniversary date to be eligible to receive an increase on their Merit Date.



# Battlefield Fire Protection District

## Policy Manual

### *Merit Pay*

---

**Rehired Employees** - Employees that are rehired into employment shall have their latest hire date become their merit increase eligibility date. This date will become their merit increase eligibility date for the remainder of their career.

**Extended Leave** - Employees on any type of extended leave who miss their eligibility date will receive a merit increase upon their return. If at the time of the rating, the supervisor determines the employee has not worked enough hours to sufficiently rate the employee's performance, the supervisor can use the rating from the previous year's evaluation. Six (6) months of attendance during the rating period is not required. The employee's eligibility date does not change.

**Disciplinary Action** - Employees who receive a written or greater conduct disciplinary action during the 12 month rating period are not eligible for a merit increase. The employee's performance evaluation and date of merit increase eligibility remain January 1.

**Performance-Based Action** - If an employee falls below "Meets Expectations" in one or more duty areas the supervisor should immediately address those areas and counsel with the employee. This will allow the employee an opportunity to improve in unacceptable areas before the end of the rating period.

If at any time during the evaluation period the supervisor determines that the employee's performance in one or more of the duty areas has fallen below an acceptable standard ("meets expectation"), the supervisor should immediately place the employee on performance-based probation, address those areas, and counsel with the employee. The probation period will not exceed 180 calendar days initially. The supervisor should develop a "Performance Improvement Plan" clearly defining what is expected, consistently monitoring, and providing feedback/counseling to the employee. If the employee's overall performance improves during the probation period but not to the level of satisfactory standards by the end of the probationary period, the rater can extend, but is not required to extend, the probationary period for an additional timeframe not to exceed 90 calendar days. If the employee does not exhibit performance improvement to the satisfactory level at the end of the second probationary period, the employee will be subject to a demotion, transfer, reassignment, or termination.

If an employee is placed on probation, the terms and conditions of the probation should be documented and a copy sent to District Headquarters for placement in the employee's official personnel file. If the employee's performance improves and the probation period is ended, written documentation of the probation results should be sent to District Headquarters for placement in the employee's official personnel file. Employees are allowed to make a formal request for reconsideration of their performance evaluation rating by the next level of supervisor above the rater. Employees should always receive a copy of the completed and signed Performance Evaluation.

**Promotions/Demotions/Transfers** - Employees who transfer or receive a promotion or demotion will be eligible on their merit date to receive their merit increase. If an employee has been in the new position less than six months, the current supervisor has the option of conducting the PE or may request the PE from the previous supervisor.

# Battlefield Fire Protection District

## Policy Manual

### Merit Pay

---

#### Merit Increase Matrix

Exceeds Standards	1.50 %
Above Average	1.00 %
Unsatisfactory / Meets Expectations	0.00 %

Any employee that supervises other employees who are either management or supervisory personnel who fail to complete an annual evaluation of employees under their administrative control shall NOT be eligible for merit payments.

#### 1062.2.2 FUNDING

##### Agency Content

If the District determines that funds are insufficient to implement the merit increases authorized in this policy or by any other policy that affects salary/wage increases for employees, the Chief, upon approval of the Board, may reduce the percentage of all authorized merit increases for all employees covered.

However, if sufficient funds should then become available at any time during the budget year to provide the merit increases for all employees, merit increases for employees may then be fully implemented by the District.

#### 1062.3 BOARD APPROVAL

##### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

## Paid Holidays

### 1053.1 POLICY

**Agency Content**

- (a) The following is the list of Holidays recognized for all employees of the District:
- New Year's Day - January 1
  - Memorial Day - Last Monday in May
  - Independence Day - July 4
  - Labor Day - 1st Monday in September
  - Veteran's Day - November 11
  - Thanksgiving Day - 4th Thursday in November
  - Christmas Day - December 25
- (b) Shift employees will be paid additional time and one half (2.5) for working the holiday in lieu of paid time off plus a day's pay for the holiday. Shift employees are required to work the shift in order to receive the holiday rate.
- (c) The full-time administrative personnel shall be given the recognized holidays off with pay. The Mechanic and Maintenance position may be requested to work on a holiday at which time they would be compensated at a time and a half rate. For holidays, which fall upon Saturday or Sunday, the Fire Chief shall reschedule the administrative personnel off with pay on the Friday before or the Monday after the holiday. Administrative personnel are also granted holiday leave for Christmas Eve and the Friday following Thanksgiving Day.
- (d) These policy items do not apply to reserve or part-time personnel, as these positions do not fall into the holiday or overtime pay classifications.

### 1053.2 BOARD APPROVAL

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Reduction In Staffing

## 1055.1 POLICY

### Agency Content

In the event the District is required to reduce personnel, employees having the least seniority with the District shall be laid off first. No new employee shall be hired until all laid-off employees have been given ample opportunity to return to work. Reduction in rank will be handled by demoting the employee last promoted or transferred into that position.

## 1055.2 PERSONNEL REINSTATEMENT

### Agency Content

In the event reinstatement of personnel becomes necessary, then the last employee to leave will be the first offered reinstatement, if they are qualified for the open position. Reinstated employees will not be considered probationary, and will be reinstated at the level they are qualified for within the rank reinstated at. District seniority will be equal to that at the time of layoff. Should an employee be reinstated at a rank less than the rank he/she was previously at, he/she could be eligible for a promotion as soon as the next opening in that rank is available, as long as he/she presently meets the qualifications.

## 1055.3 DURATION OF TIME OFF

### Agency Content

Should the duration of time off exceed a period of one (1) year the furloughed employee will be required to provide proof they are still maintaining job qualifications. The employee will be required to take the physical agility test, pass a new medical exam, and pass a drug screening prior to reinstatement.

## 1055.4 NOTIFICATION

### Agency Content

The District will attempt to contact all previous employees, on layoff, by certified mail at the address last known by the District. Failure of the former employee to accept the employment and report to duty within fourteen (14) days of the notice shall be deemed a rejection of the reemployment offer. All previous employees, on layoff, will be contacted first prior to hiring any new full-time employees.

## 1055.5 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Surplus Property

## 215.1 PURPOSE AND SCOPE

### Agency Content

This policy shall establish the process of the Battlefield Fire Protection District in removing surplus property from the District.

## 215.2 POLICY

### Agency Content

The District recognizes all assets are purchased with public funds and the District should follow a standard to relinquish surplus property in a manner that allows the fire service abroad as well as the community members an opportunity to purchase surplus property. The District shall divide items into two categories, General Items and Firefighting Equipment.

### 215.2.1 FIREFIGHTING EQUIPMENT

#### Agency Content

This category shall include items that are specific to fire fighting operations, technical in nature, and would be of little to no use to the general citizen. The District shall promote firefighting equipment surplus throughout the fire service arena. This may be done via any combination of the following, but not limited to email systems, faxes, postings, websites, or newspaper advertisements.

### 215.2.2 GENERAL ITEMS

#### Agency Content

This category shall include items that could be of use to the general citizen. The District shall promote general items within the District. This may be done via any combination of the following, but not limited too; email systems, faxes, postings, websites, or newspaper advertisements.

## 215.3 BOARD APPROVAL

### Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Transfers

## 1061.1 PURPOSE AND SCOPE

Agency Content

The purpose of this policy is to establish requirements for transfers of personnel.

## 1061.2 POLICY

Agency Content

Any transfer initiated by the District shall provide adequate time as to not create undue hardship on the employee being transferred. This does not include transferring of stations to cover sick leave, education leave, or vacation time.

Any transfer request made by the employee shall be in written form. The Fire Chief or designee shall respond to the request in writing within fourteen (14) calendar days.

Employees with equal rank may exchange shifts if it does not interfere with the operations of the District and approval from the Fire Chief or designee. Employees may not exchange shifts for monetary compensation.

## 1061.3 BOARD APPROVAL

Agency Content

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Wage Incentives

## 1058.1 POLICY

### Agency Content

Incentives shall be considered an annual sum added to the base pay of all full-time employees, given for additional education or skills not necessarily required for the position held by the employee. These incentives will be considered part of an employee's hourly wage. The incentives will be awarded after the employee has completed a full twelve (12) months of service and once earned for existing employees. Should a skill or educational requirement be necessary for a position based in the job description then the incentive would be removed. The educational incentives are not accumulative; once a higher level of education is obtained the lesser amount will not be collected along with the new higher incentive. The certification incentives shall be accumulative and added together when each certification level is achieved. Employees must maintain the credentials they receive incentive for which are audited annually.

### 1058.1.1 EDUCATIONAL INCENTIVE SCALE

#### Agency Content

- Associates Degree: \$1,500
- Bachelor's Degree: \$2,000
- Master's Degree: \$2,500

### 1058.1.2 CERTIFICATION INCENTIVE SCALE

#### Agency Content

- Officer I: \$250
- Officer II: \$250
- Instructor I: \$250
- Instructor II: \$250
- Inspector: \$250
- Investigator: \$250
- Paramedic License: \$1,000

### 1058.1.3 OUT OF GRADE

#### Agency Content

As employees reach the requirements listed within Chapter 10 Policy "Working Out of Grade", the annual increase will be added to the employee's base salary.

- Driver/Operator: \$300
- Company Officer: \$500
- Battalion Chief: \$750

# Battlefield Fire Protection District

## Policy Manual

### *Wage Incentives*

---

#### **1058.2 BOARD APPROVAL**

##### **Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on



# Wages and Salary Administration

## 213.1 PURPOSE AND SCOPE

**Agency Content**

The following statements express the District's objectives with respect to the salary schedules for all employees. The District recognizes that not all of these objectives may be completely achieved at all times for employees, but they are set forth to serve as guides against which proposed actions are to be evaluated.

## 213.2 POLICY / INTENT

**Agency Content**

The District performs payroll through direct deposit. An employee who wishes to allow a third party to receive or pick up his/her paperwork must provide written permission to the District before the paperwork will be released. If an employee wishes to rescind, alter or add his/her permission, written authorization must be provided to the District.

It is the District's intent to establish and maintain a compensation system that will reward qualified personnel at all levels of responsibility, reflect the difficulty and responsibility of jobs and be internally consistent and fair to motivate the employees to carry out the mission of the District and to strive to the achievement of the District's goals and objectives by controlling direct and indirect personnel costs, be flexible and simple to administer and comply with applicable laws. It will be the policy of this District to establish a wage and salary range that reflects the value to the District of the various job positions, as determined by the continuing system of job evaluation and review as determined by a systematic program of performance based evaluation and ensure that compensation is not influenced by age, sex, creed, race, or national origin.

## 213.3 EVALUATION

**Agency Content**

During the budget development process the Fire Chief and Board of Directors shall evaluate the pay scale for any increases. The cost of living pay increase (COLA), if given, shall be instituted at the beginning of a calendar year. Pay increases that relate to educational incentive shall be instituted when earned.

## 213.4 CYCLE

**Agency Content**

The District's pay date shall be every two weeks (on Fridays). The District will make every effort to prepare payroll on the last working day immediately preceding the normal pay period when the payday falls on an observed holiday. It is the employee's responsibility to forward all hours, to include regular, recall, events, and overtime hours, worked to the Battalion Chief for documentation. These hours must reflect the time started and the time ended.

# Battlefield Fire Protection District

## Policy Manual

### *Wages and Salary Administration*

---

#### **213.5 COST OF LIVING ADJUSTMENTS (COLA)**

##### **Agency Content**

The Fire Chief will annually evaluate local, regional, and national consumer price indexes, other governmental pay increases, and surveys in comparable job positions in order that he/she may recommend an appropriate salary adjustment to the Board of Directors.

#### **213.6 DEDUCTIONS**

##### **Agency Content**

Only the Board of Directors may approve voluntary payroll deductions. Once the Board has approved a specific type of deduction, each individual employee must provide the District with written notice allowing the deduction from his/her compensation. Deductions will not terminate until written notice is provided to the District.

#### **213.7 UNION DUES**

##### **Agency Content**

Union dues, and the manner in which they are paid, are the responsibility of the members. The language for such can be found in the CBA.

#### **213.8 BOARD APPROVAL**

##### **Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Work Statement

## 1014.1 UNIFORMED EXEMPT ADMINISTRATIVE PERSONNEL

### Agency Content

Recognized office hours for Administrative Personnel should be from 0800 hours to 1700 hours, Monday through Friday, excepting those weekdays which fall upon legal holidays recognized by the District. These time frames are flexible based on the special needs of the District. Administrative Personnel shall be subject to call, as needed, beyond the recognized office hours. A system shall be developed to ensure that the District is covered by one (1) Chief Officer at all times.

## 1014.2 UNIFORMED EXEMPT SHIFT PERSONNEL

### Agency Content

The work schedule for the District's uniformed exempt shift personnel is based on a 24/48 hour schedule. Each tour of duty is twenty-four (24) hours in length followed by forty-eight (48) hours off.

The shift personnel work twenty-four (24) hours, 0700-0700 hours. Shift employees may not leave their assigned tour of duty until relieved by on-coming personnel. These hours will be flexible and depend on the call load, daily activities, and the objectives to be completed. Employees may take up to one (1) hour meal periods. Generally, these meal periods should fall between 0730-0830 hours for breakfast, 1130-1330 hours for lunch, and 1700-1900 hours for supper. These times may be adjusted accordingly to accommodate emergency incidents and special assignments.

## 1014.3 UNIFORMED NON-EXEMPT SHIFT & 40 HOUR PERSONNEL

### Agency Content

The work schedule for the District's uniformed exempt shift personnel is based on a 24/48 hour schedule. Each tour of duty is twenty-four (24) hours in length. The District pays employees every two weeks. The employee's salary is based on an hourly wage. The hours are calculated per the Missouri Wage Law. Any hours worked above the allowable amount are awarded as overtime, which is half time (1/2) above the regular rate, which correlates to time and a half (1 ½) overtime rate.

The shift personnel work twenty-four (24) hours, 0700-0700 hours. Shift employees may not leave their assigned tour of duty until relieved by an on-coming shift. These hours will be flexible and depend on the call load, daily activities, and the objectives to be completed. Employees may take up to one (1) hour meal periods. Generally, these meal periods should fall between 0730-0830 hours for breakfast, 1130-1330 hours for lunch, and 1700-1900 hours for supper. These times may be adjusted accordingly to accommodate emergency incidents and special assignments.

The Mechanic works five (5), eight (8) hour days, 0800-1700 hours at forty (40) hours per week, Monday through Friday. These hours may be flexible based on the District's needs and prior approval of the Fire Chief or designee. The District pays employees every two weeks. The employee's salary is based on an hourly wage. The hours are calculated per the Missouri Wage

# Battlefield Fire Protection District

## Policy Manual

### Work Statement

---

Law. Any hours worked above the allowable amount are awarded as overtime, which is half time (1/2) above the regular rate, which correlates to time and a half (1 1/2) overtime rate. The Mechanic may take a one (1) hour meal period. Generally, this meal period should fall between 1100-1330 hours for lunch.

#### **1014.4 NON-UNIFORMED NON-EXEMPT PERSONNEL**

##### **Agency Content**

The Administrative Assistant works five (5), eight (8) hour days, 0800-1700 hours at forty (40) hours per week, Monday through Friday. These hours may be flexible based on the District's needs and prior approval of the Fire Chief or designee. The Administrative Assistant's rate of pay is based on an hourly rate with benefits provided by the District. The Administrative Assistant shall be given one (1) hour for lunch.

#### **1014.5 UNIFORMED PART TIME & RESERVE PERSONNEL**

##### **Agency Content**

The Part-time and Reserve personnel work on an as-needed basis. These positions are on an hourly basis, do not accumulate benefits, and may not work more than 1500 hours per year. These hours will be flexible based on the District's needs and prior approval of the Fire Chief or designee. The District pays employees every two weeks. The employee's salary is based on an hourly wage. The hours are calculated per the Missouri Wage Law.

#### **1014.6 BOARD APPROVAL**

##### **Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on

# Working Out of Grade

## 1057.1 POLICY

**Agency Content**

- (a) Employees may work out of grade upon approval of their immediate supervisor and staff. As employees are released to work out of grade, they will perform this function as a training mechanism for personal growth and development. Once the employee has successfully completed the requirements for the eligible incentive, Policy will provide the incentive to the employee's salary.
- (b) Employees earning Out of Grade incentives will be evaluated every five years after achieved. Incentives may be removed if skills are not maintained or used.
- (c) ELIGIBLE INCENTIVE
  - 1. DRIVER/OPERATOR
    - (a) Employees will be required to complete the District's skills task book for Driver/Operator and pass an assessment of skills based upon NFPA 1002.
  - 2. COMPANY OFFICER
    - (a) Firefighters meeting the position description requirements.
  - 3. BATTALION CHIEF
    - (a) Company Officers meeting the position description requirements.
- (d) Once the employee meets the requirements, they may receive an incentive added to their annual salary based upon the rank they are working out of grade.
- (e) In the event an employee is assigned to work out of grade for an extended period as a Company Officer or Battalion Chief, the District will evaluate the need for temporary promotion based upon the needs of the District.

## 1057.2 BOARD APPROVAL

**Agency Content**

This policy was approved by the Battlefield Fire Protection District Board of Directors on