

## Checklist for VEBA New Group Formation:

- ☐ 1. Per MCA 2-18-1310, employers may offer the Montana VEBA HRA option, or employees may request it be offered. Per Administrative Rule 2.21.1938, once VEBA is requested by at least 25% of a work unit, then the employer shall facilitate the election within 60 calendar days from the date of the request. Employers shall notify employees of a vote at LEAST 15 days prior to the first day of the voting period.
- ☐ 2. Determine if group will be all members of the work unit (any separation) or those who are vested or fully eligible to retire with MPERA (eligible to retire.) Request most recent eligible to retire list for the public entity from VEBA coordinator to verify retirement eligible status.
- ☐ 3. Complete an [Employer Resolution](#) if your public entity requires one.
- ☐ 4. Determine union and non-union composition of the group. If the group is a blend of union and non-union employees, a [MOU Memorandum of Understanding](#) must be executed.
- ☐ 5. Send an organizational chart of proposed group to VEBA coordinator for review/approval.
- ☐ 6. Complete and send the [Employer Adoption Agreement](#) and send to the VEBA coordinator for review and signature. Once an Employer Adoption Agreement is signed and accepted, multiple groups may be formed by the public entity.
- ☐ 7. Set up education session(s) via Teams, Zoom or in person with VEBA coordinator.
- ☐ 8. Once education sessions are complete, contact group to determine interest to proceed with a group vote.
- ☐ 9. Complete the template for new Montana VEBA HRA group vote, [Cover Memo and Ballot Template](#). Fill in required fields and send to VEBA coordinator for review/approval. Send cover memo and ballot to potential group members. Note – If the group did not come to consensus, a [Straw Poll Ballot](#) may be sent. Straw Poll results based on majority will then move to the Cover Memo & Ballot (above).
- ☐ 10. Summarize results of completed vote, fill out the [Vote Results Summary Template](#) and send out to the group. If the group did not pass, please notify VEBA resource of the failed vote and you are done at this step. If it passed, continue with #11.
- ☐ 11. Fill out the [Annual Policy Template](#).
- ☐ 12. Complete the [Member Roster](#).
- ☐ 13. Send the following to the VEBA coordinator:
  - Copy of the finalized group cover memo and ballot.
  - Vote results summary.
  - Completed member roster.
  - Signed Annual Policy.
- ☐ 14. Set calendar reminder for 30 days prior to renewal date of the group for annual vote notification the following year.