

PERAC

PERAC Memo # 37 / 2013

COMMONWEALTH OF MASSACHUSETTS | PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION COMMISSION

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MEMORANDUM

TO: All Retirement Boards
FROM: *Joseph E. Connarton*
Joseph E. Connarton, Executive Director
RE: Mandatory Retirement Board Member Training-1st Quarter 2014
DATE: December 27, 2013

As you know, Chapter 32 mandates that retirement board members complete training during each year of service on the retirement board. Failure to meet this mandatory requirement will prohibit the member from serving beyond the conclusion of the term for which the training requirement was not met.

It should be noted that in awarding the number of credits for individual courses the Commission does not necessarily base that number on the length of the program but also considers the nature of the topic involved.

Please note, affidavits will be accepted as proof of attendance for on-line courses (see below AG, IG and Ethics Commission).

Pre - Approval

The Commission is willing to approve educational credits for a variety of events sponsored by "...local, state, regional and national organizations recognized by the Commission as having expertise in retirement issues of importance to retirement board members or other entities..." This provision of the statute has been interpreted to encompass particular programs offered by such entities. For example, an ethics class or open meeting law class offered as part of a broader conference may be eligible for education credit. However, approval for such credit must take place well in advance of the date of the event. This will enable the Commission to analyze the program and to provide a general notice to retirement board members to maximize participation.



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January, February and March Educational Events

PERAC's Annual Statement; Schedule 7 (Three Credits)

1. Wednesday, January 15, 2014 at 10:00 a.m. at the PERAC Office, 5 Middlesex Avenue, 3rd Floor, Somerville, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).
2. Wednesday, January 22, 2014 at 10:00 a.m. at the Springfield Retirement Board, 70 Tapley Street, Springfield, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).
3. Wednesday, February 5, 2014 at 10:00 a.m. at the Dan Toomey Room, First Floor, Danvers Town Hall, 1 Sylvan Street, Danvers, MA. Please use the Municipal Parking Lot across from Town Hall. (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).

Pre-Retirement Counseling-Post Retirement Earnings Limits (Three Credits)

1. Wednesday, February 12, 2014 at 10:00 a.m. at the Fairhaven Town Hall, 40 Center Street, Fairhaven, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).
2. Wednesday, February 19, 2014 at 10:00 a.m. at the PERAC Office, 5 Middlesex Avenue, 3rd Floor, Somerville, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).
3. Wednesday, February 26, 2014 10:00 a.m. at the PERAC Office, 5 Middlesex Avenue, 3rd Floor, Somerville, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).

MacAloney, Survivor Benefits, Confederate Widows and Other Cases of Interest, (Three Credits)

1. Wednesday, March 12, 2014 at 10:00 a.m. at the PERAC Office, 5 Middlesex Avenue, 3rd Floor, Somerville, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).
2. Wednesday, March 19, 2014 at 10:00 a.m. at the PERAC Office, 5 Middlesex Avenue, 3rd Floor, Somerville, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).

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3. Wednesday, March 26, 2014 at 10:00 a.m. at the Middlesex County Retirement Board, 25 Linnell Circle, Billerica, MA (Please e-mail Rose Cipriani at RCipriani@per.state.ma.us to make reservations).

ON-LINE TRAINING

State Ethics Commission On-Line Conflict of Interest Law Training (Three Credits)

In order to access the program retirement board members should go to the Ethics Commission Web Page at www.mass.gov/ethics/ and then click on the link "Conflict of Interest On line Training Programs". Following transfer to that page scroll down and click the link to "Municipal Employee Online Training Program".

Office of the Inspector General – Bidding Basics (Three Credits)

The Office of the Inspector General (OIG) has developed an introductory on-line course that covers the legal requirements for the procurement of contracts by local government bodies for supplies and services under MGL c. 30B. Although that statute does not apply to "a contract for retirement board services" recently enacted law sets forth similar requirements for retirement boards to follow when seeking certain services. In addition, retirement board members, under their fiduciary duty to act as a prudent expert would act, should employ best practices in this area.

Bidding Basics takes two to three hours to complete. It has been designed to be completed through PACE, the Commonwealth's Web-based Learning Management System, or at your standalone computer using a Compact Disc (CD).

PACE should be accessible to any entity with an Internet connection. Upon registering with the Office of the Inspector General, you will be issued a PACE Login ID and Password so that you may access PACE for free. For further information about Bidding Basics, access <http://www.mass.gov/ig/mcppo/seminars-and-courses/bidding-bascis.html>. In the right-hand column of that page you may access a link to the Bidding Basics FAQs and a link to the Bidding Basics Online Registration Form, or you may obtain the form directly by selecting <http://www.mass.gov/ig/publications/forms/bb-online-regform.doc>

Office of the Attorney General – Open Meeting Law (Three Credits)

The Office of the Attorney General (AG) offers an on line web training seminar on the Open Meeting Law. That program is accessible at

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<http://www.youtube.com/user/MassAttorneyGeneral>. It can also be accessed through the AG's Web Page by clicking on "Government Resources" and then clicking on "Open Meeting Law" and on that page clicking on "Web Training".

Retirement board members can confirm participation in the offerings by the Inspector General, Ethics Commission, and Attorney General by filing an affidavit with the Commission. After completing the course fill out the Affidavit available at http://www.mass.gov/perac/training/Training_Affidavit.pdf and fax or mail to PERAC, attention Tom O'Donnell.

Other Webinars

The Commission has approved education credit for participating in Webinars. In 2014, we will entertain requests for credit in relation to relevant Webinars, again, provided that such a request is made well in advance of the session.

Thank You

The Commission would be remiss if we did not thank all the rank and file members of the retirement boards who, in spite of other pressing duties, are making a good faith effort to fulfill their duties and responsibilities.