

# PERAC

COMMONWEALTH OF MASSACHUSETTS | PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION COMMISSION

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## MEMORANDUM

TO: All Retirement Boards

FROM: Bill Keefe, Executive Director

RE: Mandatory Retirement Board Member Training – 3rd Quarter, 2026

DATE: June 24, 2026

Chapter 32 mandates retirement board members to complete training during each year of service on the retirement board. This requirement has two elements: 18 credits over the course of the member's term and at least 3 credits in each year of the term. Failure to meet either of these statutory standards will prohibit the member from serving beyond the conclusion of the term for which the training requirement was not met. We urge board members to utilize the full array of training choices in order to remain eligible to serve. All classes, webinars, seminars, and conferences listed will earn **three credits each**, unless otherwise noted.

### Ways to receive your credits:

- Credits for attending *live* PERAC webinars, the New Administrator Training, and the Emerging Issues Forum are automatically updated by PERAC staff approximately one week after the event.
  - All attendees must register through the links available on our website.
  - Board members seeking educational credits – it is important that you register with your full name and the email address we have on record so we can accurately update your account.
- You must submit a completed Training Affidavit in PROSPER for all other trainings, including pre-recorded PERAC webinars and pre-approved webinar and conference attendance. Any session listed under sections I through V are pre-approved.
- If a Certificate of Completion is offered for any training not directly provided by or sponsored by PERAC, you must submit the certificate through PROSPER to receive credit.
- Please note the full name of the recorded session you have viewed when submitting a Training Affidavit in PROSPER.
- Some sessions require pre-registration. Check individual sessions for closing dates.

The Commission appreciates all the retirement board members who are making a good faith effort to fulfill their duties and responsibilities. We look forward to seeing many of you at the Forum and wish you all a safe and enjoyable summer!



**I. Training Schedule Dates (pre-registration is required)**

<b>Date/Time</b>	<b>Topic/Organization</b>	<b>Registration / Location</b>
<b>July 12-15</b>	<b>NCTR Trustee Workshop</b>	<a href="#">Register for Workshop</a>
	National Conference on Teacher Retirement	Berkeley, CA
<b>July 21</b>	<b>Retirement Board Best Practices</b>	<a href="#">Register for Webinar</a>
11:00 a.m.	PERAC	
<b>July 23</b>	<b>Fraud Awareness</b>	<a href="#">Register for Webinar</a>
1:00 p.m.	OIG Academy	
<b>July 24</b>	<b>Open Meeting Law Training</b>	<a href="#">Register for Webinar</a>
12:00 p.m.	AGO	
<b>August 4</b>	<b>Open Meeting Law Training</b>	<a href="#">Register for Webinar</a>
9:30 a.m.	AGO	
<b>August 8-12</b>	<b>NASRA Annual Conference</b>	<a href="#">Register for Conference</a>
	Nat. Assoc. of State Retirement Admin.	Boston, MA
<b>August 17-19</b>	<b>Public Pension Funding Forum</b>	<a href="#">Register for Conference</a>
	NCPERS	Chicago, IL
<b>August 19</b>	<b>Administrator Training</b>	<a href="#">Register for Training</a>
8:00 a.m.	PERAC	Northampton, MA
<b>August 19</b>	<b>Open Meeting Law Training</b>	<a href="#">Register for Webinar</a>
9:00 a.m.	AGO	
<b>August 31</b>	<b>Fraud Awareness</b>	<a href="#">Register for Webinar</a>
1:00 p.m.	OIG Academy	
<b>September 17</b>	<b>Emerging Issues Forum</b>	Registration opens next month!
9:00 a.m.	PERAC	Westborough, MA
<b>September 23-25</b>	<b>NCPERS Public Pension HR Summit</b>	<a href="#">Register for Summit</a>
	NCPERS	Phoenix, AZ
<b>October 3-6</b>	<b>NCTR Annual Conference</b>	<a href="#">Register for Conference</a>
	NCTR	Coeur D'Alene, ID

<b>October 16-21</b>	<b>NPEA National Conference</b>	<a href="#">Register for Conference</a>
	National Pension Education Assoc.	Indianapolis, IN
<b>October 25-28</b>	<b>Advanced Fiduciary Institute</b>	<a href="#">Register for Conference</a>
	PERAC	Nashville, TN
<b>October 25-28</b>	<b>Public Safety Conference</b>	<a href="#">Register for Conference</a>
1:00 p.m.	AGO	Nashville, TN
<b>November 4</b>	<b>Administrator Training</b>	Registration opens next quarter
	PERAC	Woburn, MA
<b>March 11, 2027</b>	<b>Administrator Training</b>	Registration opens next quarter
	PERAC	Norwood, MA

## II. Recently Added or Recurring Pre-Approved Online Training (available on demand)

<b>Organization</b>	<b>Topic</b>
Office of the Inspector General	<a href="#">Inspector General Videos</a> <b>You must watch all three videos</b>
Office of the Attorney General	<a href="#">Open Meeting Law Training</a> <b>You must watch all six videos</b>
National Council on Teacher Retirement	New webinars added: <ul style="list-style-type: none"> <li>• <a href="#">The intersect between cybersecurity and AI</a></li> <li>• <a href="#">The Federal Government and Public Plans</a></li> <li>• <a href="#">Fiduciary Duties: Questions and Misconceptions</a></li> </ul>
National Conference on Public Employee Retirement	New webinars added: <ul style="list-style-type: none"> <li>• <a href="#">Public Pension Outlook: Investment Consultant Perspectives</a></li> <li>• <a href="#">Policy and Budget Outlook</a></li> </ul>

Links to all of the above resources can be found on PERAC's Education page at [mass.gov/perac-education](https://mass.gov/perac-education). Members can view the recordings and receive 3 educational credits by completing a Training Affidavit in PROSPER.

### III. Conflict of Interest Online Training (three credits)

The State Ethics Commission no longer offers live webinars for the Conflict of Interest Law training. Users must create a login to take the training and receive a certificate:

- Go to [mass.gov/how-to/complete-the-conflict-of-interest-law-education-requirements](https://mass.gov/how-to/complete-the-conflict-of-interest-law-education-requirements)
- If your retirement system is not listed in the dropdown menu, please have your board contact the State Ethics Commission at [ethicstraining@mass.gov](mailto:ethicstraining@mass.gov). They will add organizations upon request.
- A certificate of completion is still required to receive credit for this training and credits may only be awarded once every two years.

### IV. Administrator Training

Our next round of Administrator training begins on August 19, 2026, in Northampton. The same training will be repeated again this fall in Woburn on November 4, 2026 and next year in Norwood, on March 11, 2027. [Registration is only open for the Northampton location.](#)

While this all-day training is designed for newer administrators and board staff with less than five years of experience, all who would like a refresher are welcome to attend. Full agenda will be available in July.

**Date:** August 19, 2026, 8:00 a.m. to 2:00 p.m.

**Location:** Hotel Northampton, 36 King Street, Northampton, MA 01060

**Credits:** Retirement board members who attend will receive three educational credits.

Register through PROSPER. If an individual wishing to attend does not have access to PROSPER, please contact Rose Morrison at [rose.a.morrison@mass.gov](mailto:rose.a.morrison@mass.gov).

### V. Emerging Issues Forum

We will be returning to the DoubleTree by Hilton in Westborough, MA for the Emerging Issues Forum this year.

The preliminary agenda features Evan Horowitz, Executive Director, Center for State Policy Analysis, Tufts University returning to the Forum with his take on the state of the state economy and budget. Other featured topics include a board staffing panel, an AI/Cyber Panel, and an investment panel. The final agenda and registration link will be published in mid-July.

**Date:** Thursday, September 17, 2026, 9:00 a.m. to 3:00 p.m.

**Location:** DoubleTree by Hilton, 5400 Computer Drive, Westborough, MA

**Credits:** Retirement board members who attend will receive three educational credits.

**Room block:** We will once again have a very limited room block available for individuals wishing to drive to the venue the night before at a rate of \$149 plus tax for a standard room. These rooms are available on a first come, first served basis **through August 17, 2026**. You can reserve the room directly through the hotel with our [Public Employee Retirement Administration Commission Booking Link](#).

Please contact Natacha Dunker at [natacha.a.dunker@mass.gov](mailto:natacha.a.dunker@mass.gov) if you would like to request a reasonable accommodation to attend PERAC sponsored in-person trainings or Forums.

## VI. Other Opportunities to Obtain Educational Credit

The Commission is willing to approve other 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..."

Additionally, the Commission has approved education credit for participating in webinars. We will entertain requests for credit in relation to *relevant* webinars provided that such a request is made well in advance of the session.

### **Approval for credit must take place well in advance of the date of the event or webinar.**

This will enable the Commission to analyze the program and provide a general notice to other retirement board members to maximize participation. Once approved, you must complete the Training Affidavit in PROSPER to ensure proper credit. Board members experiencing Extenuating Circumstances in meeting educational requirements should review Memo 15 of 2019 and contact PERAC with any questions.

The following list of local and national organizations provide additional educational opportunities that may be relevant for retirement board members:

- [American Society of Pension Professionals and Actuaries](#) (ASPPA)
- City/Town Sponsored Conflict of Interest or Open Meeting Law Training
- [Government Finance Officers Association](#) (GFOA)
- [International Foundation of Employee Benefit Plans](#) (IFEBP)
- [MA Association of School Committees](#) Open Meeting Law Training
- [MA Town Clerks Association](#) Ethics Training
- [National Association of State Retirement Administrators](#) (NASRA)
- [National Conference on Public Employee Retirement Systems](#) (NCPERS)
- [National Council on Teacher Retirement](#) (NCTR)
- [National Pension Education Association](#) (NPEA)