

PERAC

COMMONWEALTH OF MASSACHUSETTS | PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION COMMISSION

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MEMORANDUM

TO: All Retirement Boards

FROM: John W. Parsons, Esq., Executive Director

RE: Mandatory Retirement Board Member Training – 4th Quarter 2023

DATE: September 28, 2023

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 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.

Please note that the Office of the Inspector General renamed their MCPPO training program to OIG Academy. A selection of courses is pre-approved for credit by PERAC. The Commission appreciates all the retirement board members who are making a good faith effort to fulfill their duties and responsibilities. We hope everyone has a safe and productive last quarter and enjoys the upcoming holiday season!



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

Date	Topic/Organization	Location / Registration Information
October 1-4	MACRS Fall Conference	Conference, Springfield, MA
	MACRS	See macrs.org for registration and price
October 4	Open Meeting Law	Webinar
10:30 a.m.	AGO	https://tinyurl.com/10-04-AGO
October 7-10	NCTR Conference	Conference, La Jolla, CA
	National Conference on Teacher Retirement	See nctr.org for registration and price
October 19	Contract Administration	Webinar (\$200)
8:15 a.m.	OIG Academy	mass.gov/info-details/contract-administration
October 21	NCPERS PAT/NAF Pre-Conference	Conference, Las Vegas, NV
	National Conference of Public Employee Retirement Systems	See ncpers.org for registration and price
October 22-25	FALL Conference	Conference, Las Vegas, NV
	National Conference of Public Employee Retirement Systems	See ncpers.org for registration and price
October 25	PRIM Client Conference	Conference, Wellesley, MA
	PRIM	tinyurl.com/PRIM-1025
October 26	Open Meeting Law	Webinar
6:00 p.m.	AGO	https://tinyurl.com/10-26-AGO
November 14	New Administrator Training	Training, Danvers, MA
8:00 a.m.	PERAC	PROSPER
November 14	Fraud Awareness	Webinar
2:00 p.m.	OIG Academy	mass.gov/info-details/fraud-awareness
November 20	How to Detect Fraud in Financial Statements	Webinar (\$29)
10:30 a.m.	OIG Academy	https://tinyurl.com/OIG-detect-fraud
November 29	Boards and Commissions	Webinar
1:00 p.m.	OIG Academy	https://tinyurl.com/OIG-Boards
November 30	Procurement Fraud	Webinar (\$200)
8:15 a.m.	OIG Academy	mass.gov/info-details/procurement-fraud
December 1	Contract Administration Overview	Webinar (\$29)
11:30 a.m.	OIG Academy	https://tinyurl.com/OIG-contract-overview
December 14	Recent Cases of Interest	Webinar
10:00 a.m.	PERAC	https://tinyurl.com/PER-121423

II. New Administrator Training

Our 2023 series for new board administrators continues in Danvers, Massachusetts this quarter. This all day training is designed for newer administrators and board staff with less than five years of experience, however board members are welcome. Should board members choose to attend, they will earn three educational credits.

Training information:

Danvers DoubleTree by Hilton Hotel
50 Ferncroft Road, Danvers, MA 01923
November 14, 2023, 8:00 a.m. to 3:00 p.m.

Register through PROSPER. If an individual wishing to attend does not have access to PROSPER, please contact Rose Morrisson at rose.a.morrison@mass.gov. Lunch will be served. Please advise our staff if you need reasonable accommodations at least two weeks prior to the training date.

III. Fall MACRS Conference

PERAC will be presenting at the fall MACRS Conference next week. If you have not yet registered, you can find the registration link at macrs.org

Conference information:

Springfield Sheraton
One Monarch Place
Springfield, MA 01144
October 1-4, 2023

Board members who attend can earn up to nine credits – three each for the Cyber Update panel on Monday, the Legal panel on Tuesday, and the Wednesday PERAC closing session. Board members must be present and sign in at each session to ensure proper credit.

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

Organization	Topic	How to find webinar:
Office of the Inspector General	Inspector General Videos You must watch all three videos	mass.gov/service-details/inspector-general-educational-videos
Office of the Attorney General	Open Meeting Law Training You must watch all six videos	mass.gov/service-details/open-meeting-law-training-videos
National Council on Teacher Retirement (3 credits each)	<ul style="list-style-type: none"> • Administrative Challenges of Secure 2.0 • ASOP 4 Toolkit 	mass.gov/service-details/perac-online-training
PERAC	Veterans Benefits	mass.gov/service-details/perac-videos-webinars
Massachusetts Office of the State Comptroller	Cybersecurity for Retirement Boards PowerPoint Presentation Note: this presentation is provided for reference only. <i>It is not available for credit.</i>	mass.gov/doc/cybersecurity-and-privacy-awareness-and-internal-controls-retirement-boards/download

Unless otherwise noted, board members can view the listed recorded webinars and receive three educational credits by completing a Training Affidavit in PROSPER.

Links to all of the above resources can be found on PERAC's Education page at mass.gov/perac-education.

V. Conflict of Interest Online Training (three credits)

The State Ethics Commission no longer offers live webinars for the conflict of interest training. With their new online training system for the Conflict of Interest Law, users must create a login to take the training and receive a certificate.

To create a login and take the training, go to:

mass.gov/how-to/complete-the-conflict-of-interest-law-education-requirements

If you want to take the training and your retirement system is not listed in the dropdown menu, please have your board contact the State Ethics Commission: 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.

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. In 2023, we will again 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
- MA Office of the Inspector General (OIG)
- 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)