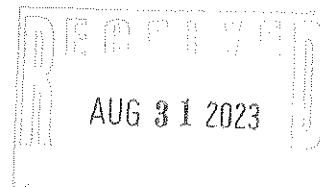


PERAC



COMMONWEALTH OF MASSACHUSETTS | PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION COMMISSION

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August 28, 2023

Rachel Grimaldi
Executive Director
Worcester Regional Retirement System
23 Midstate Drive, Suite 106
Auburn, MA 01501

Dear Ms. Grimaldi:

We have completed our review of the proposed supplemental membership and creditable service regulations of the Worcester Regional Retirement Board (the "Board"), which were submitted by letter on June 30, 2023 and amended by letter on July 19, 2023. Pursuant to the authority vested in the Commission under G.L. c. 7, § 50, the Board's proposed supplemental regulations are APPROVED as written.

The supplemental membership and creditable service regulations provide as follows:

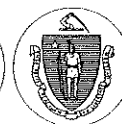
WRRB Membership Regulation:

The Worcester Regional Retirement Board shall have and exercise full jurisdiction to determine eligibility for membership in the system.

- All full-time employees of the member units are eligible for membership in the Worcester Regional Retirement System.
- Employees who work 1040 hours or more in a calendar year must become members of the system.
- Part time, provisional, temporary, seasonal, or intermittent employment or service less than 1040 hours in a calendar year is not eligible for membership.
- Additionally, for all service rendered on or after July 1, 2009, no creditable service will be granted unless the individual was employed in a position for which the rate of annual compensation was fixed at least at \$5,000.

Creditable Service

- Any member in service who is employed in a full-time capacity will



receive 1 month of creditable service for each full month for which the member receives regular compensation and makes contributions to the retirement system. Said service shall not exceed 1 year of creditable service in any calendar year.

- Any member who is employed in a part-time capacity throughout his/her entire career will receive 1 month of creditable service for each full month for which the member receives regular compensation and makes contributions to the retirement system. Said service shall not exceed 1 year of creditable service in a calendar year.
- Any member who is employed in a full-time capacity who becomes employed in a part-time capacity, or conversely, any member who is employed in a part-time capacity who becomes employed in a full-time capacity, shall receive full-time credit for all full-time service and pro-rated credit for part-time service based upon the full-time equivalency of said member unit(s). For units in which a full-time work week is equivalent to 40 hours, the full-time equivalency is 173.333 hours per month. For units in which a full-time work week is equivalent to 37.5 hours, the full-time equivalency is 162.5 hours per month.
- It is the policy of the Worcester Regional Retirement Board to accept liability pursuant to M.G.L. c. 32, s. 3(8)(c) consistent with this regulation for former employees of member units whose positions were funded through the federal Comprehensive Employment Training Act (CETA) and who otherwise would have been eligible for membership in the Worcester Regional Retirement System at the time said service was actually rendered.
- Non-certified school district employees serving in a non-teaching capacity who are continuously employed during a school year shall receive 1 month of creditable service for each full month of membership service, with 10 months being the equivalent of 1 year of creditable service. Any eligible school district employee serving in a part-time capacity shall have their creditable service pro-rated based upon the full-time equivalency of 1170 hours per school year.
- Any member employed in a School District where employment requires service for the entire calendar year will receive creditable service based on a 12-month year.

Applicability

- These regulations shall apply to membership and creditable service calculated for member buybacks, membership transfers to other

Rachel Grimaldi
Executive Director
Worcester Regional Retirement System
August 28, 2023
Page Three

Massachusetts retirement systems, and retirement benefit calculations for members of the Worcester Regional Retirement System retiring on or after August 28, 2023.

Service Purchases

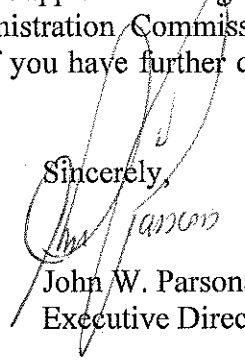
- It shall be the sole responsibility of the member to obtain and provide to the Board verification of this past service rendered, including but not limited to payroll records verified by the payroll coordinator for the employer or any other employee who has the similar duties of the payroll coordinator indicating the amount of compensation received and amount of hours worked for each calendar year in which service is sought to be purchased. In the event that any or all of such original documentation is unavailable, the Board may exercise its discretion pursuant to M.G.L. c. 32, s. 20(5)(c)(1), on a case-by-case basis to accept alternative documentation to verify said service and compensation.
- Creditable service pertaining to the make-up of eligible non-membership service shall be prorated based upon the full-time equivalency of 2080 hours per year.

Payment for Purchase of Creditable Service

- Buyback for prior eligible service, purchase of military service, or repayments for refunded service must be made in lump-sum prior to the granting of any creditable service.

Pursuant to our authority, the supplemental membership and creditable service regulations, and a list of all retirement boards that have submitted supplemental regulations, shall be kept on file within the Public Employee Retirement Administration Commission, posted on the PERAC website, and shall be available upon request. If you have further questions or concerns, please contact this office.

Sincerely,


John W. Parsons, Esq.
Executive Director