

Draft Regulations

Membership:

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

- All permanent full-time employees of the member units are eligible for membership in the Worcester Regional Retirement System.
- Employees who are regularly scheduled to work 1040 hours or more in a calendar year must become members of the retirement system.
- Part time, provisional, temporary, seasonal, or intermittent employment or service of fewer than 1040 hours in a calendar year is not eligible for membership. Substitute teachers, long term substitute teachers, permanent substitute teachers, and tutors, are by definition temporary or intermittent employees and are not eligible for membership in the retirement system.
- Employees, elected officials, and appointed officials who earn less than \$5,000 per year are not eligible for membership in the retirement system.

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 any calendar year.
- Any member who is employed in a part-time capacity who becomes employed in a full-time capacity shall receive full credit for all full-time service and pro-rated credit for part-time service based on the full-time equivalency of 173 hours per month.
- Any member who is employed in a full-time capacity who becomes employed in a part-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 173 hours per month.
- Any member who is employed in a part-time capacity throughout his/her entire career and has either purchased past refunded service, or has transferred into the Worcester Regional

Retirement System previous service rendered in a full-time capacity will receive pro-rated credit for part-time service based on the full-time equivalency of 173 hours per month.

- Members may only purchase past part-time or temporary service rendered in member units of the Worcester Regional Retirement System. The Worcester Regional Retirement System will not accept liability for non-contributing service requested by members of other retirement systems unless that member was entitled to membership and wrongfully excluded from the Worcester Regional Retirement System.
- Any member in service wishing to purchase past elected service will receive 3 months of creditable service for each year served, with 12 months being the equivalent of 1 year.
- 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. 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)(l), on a case by case basis, to accept alternative documentation to verify said service and compensation.
- 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 in the same manner as all members of the retirement system, as set forth in this regulation.
- Any member employed in a School District whose employment requires service for the entire calendar year will receive creditable service based on a 12 month year.
- Any member in service in a call firefighter capacity who is appointed as a permanent member of his/her respective non civil service fire department will be credited with 4 months of service for each calendar year served provided that earnings were \$225 or more and said call service occurred before July 1, 2009. No credit will be allowed for call service after July 1, 2009 if earnings were less than \$5,000. Call firefighters who otherwise qualify according to the provisions of G.L. 32 s.4 (2) (b) may be granted up to 5 years of creditable service.

Applicability:

- These regulations shall apply to membership and creditable service calculated for member buybacks, membership transfers to other Massachusetts retirement systems, and retirement benefit calculations for members of the Worcester Regional Retirement System retiring on or after September 1, 2011.