

**AGENDA**  
**Board of Selectmen and acting as the Wage &**  
**Personnel Board as needed**  
**Remote Location Meeting**  
**August 30, 2021 – 6:30 PM**

**PLEASE ASK IF ANYONE IS RECORDING THE MEETING**  
**AND ANNOUNCE CABLE TAPING (IF PRESENT)**

1. In accordance with provisions allowed by Chapter 20 of the Acts of 2021, the August 30, 2021 public meeting of the Lakeville Board of Selectmen will be held remotely. **However, to view this meeting in progress, please go to [facebook.com/lakecam](https://www.facebook.com/lakecam) (you do not need a Facebook account to view the meeting). This meeting will be recorded and available to be viewed at a later date at <http://www.lakecam.tv/>**
2. Board of Selectmen Announcements
3. Town Administrator Announcements
4. Discuss scheduling Special Town Meeting and discuss voting to vote to open the warrant
5. Discussion and approval of the draft Memorandum of Agreement between the Town and the IAFF Local 3188
6. Discuss and possible vote to appoint Erika Correia as Treasurer/Collector
7. Request from Police Chief to appoint Jared Taje as a Police Officer/Constable
8. Request for one-day special liquor license for the Lakeville Lions Fall Family Festival-September 11, 2021
9. Review and vote to accept letter of resignation from Brenda Carter from the Council on Aging
10. Request from South Shore Race Management to hold Mullein Hill Run for Veterans 5K on November 6, 2021
11. Discuss scheduling Board of Selectmen Meeting Dates for the remainder of 2021
12. New Business: Possible discussion on Animal Shelter board fees
13. Old Business
14. Any other business that can properly come before the Board of Selectmen

**Please be aware that this agenda is subject to change. If other issues requiring immediate attention of the Board of Selectmen arise after the posting of this agenda, they may be addressed at this meeting.**

**AGENDA ITEM #1  
AUGUST 30, 2021**

In accordance with provisions allowed by Chapter 20 of the Acts of 2021, the August 30, 2021 public meeting of the Lakeville Board of Selectmen will be held remotely. **However, to view this meeting in progress, please go to [facebook.com/lakecam](https://www.facebook.com/lakecam) (you do not need a Facebook account to view the meeting). This meeting will be recorded and available to be viewed at a later date at <http://www.lakecam.tv/>**

**AGENDA ITEM #2  
AUGUST 30, 2021**

**ANNOUNCEMENTS**

**AGENDA ITEM #3  
AUGUST 30, 2021**

**TOWN ADMINISTRATOR ANNOUNCEMENTS**

**AGENDA ITEM #4  
AUGUST 30, 2021**

**DISCUSS SCHEDULING SPECIAL TOWN MEETING AND  
DISCUSS VOTING TO VOTE TO OPEN THE WARRANT**

<u><b>ACTION</b></u>	<b>DATES</b>
Schedule Special Town Meeting	August 30 <sup>th</sup> (November 8 <sup>th</sup> ?)
Open Warrant	August 30 <sup>th</sup>
Warrant Closes	September 7 <sup>th</sup>
Vote on Articles	September 20 <sup>th</sup>
Send draft warrant to Town Counsel for review	September 21 <sup>st</sup>
Vote on Final Warrant	October 12 <sup>th</sup>
Legal ad in Paper	October 21 <sup>st</sup>
Warrant Posting	October 21 <sup>st</sup>
Warrant Review	October 25 <sup>th</sup>
<b>STM TO BE HELD</b>	<b>November 8<sup>th</sup></b>

Ari has prepared the attached list of proposed warrant articles so far.

**Fall 2021 Special Town Meeting**  
**Draft Articles**

**Budget Amendments**

**ARTICLE :** To see if the Town will vote to transfer the sum of \$353.37 from Free Cash and \$195.00 from Park Retained Earnings to pay for the following unpaid bills from the prior fiscal year; or take any other action in relation thereto.

<b>Unpaid Bill No.</b>	<b>Department</b>	<b>Vendor</b>	<b>Amount</b>	<b>Purpose</b>
1	Town Offices	Ricoh	\$353.37	Copier services
2	Park	Mr Cesspool	\$155.00	Pumping services
3	Park	Analytical Balance	\$40.00	Water testing
	<b>Total</b>		<b>\$548.37</b>	

**ARTICLE :** To see if the Town will vote to raise and appropriate from taxation the sum of \$67,000 and transfer from Septic Loan Fund the sum of \$15,000 to supplement the appropriations stated below that were previously voted in Article 1 of the May 10, 2021 Annual Town Meeting for the Fiscal Year beginning July 1, 2021 for various Town Departments; or take any other action in relation thereto.

<b>Line No.</b>	<b>Department</b>	<b>Budget Line Item</b>	<b>Amount</b>	<b>Purpose</b>
1	Selectmen/ Administration	Salaries	\$62,000	Asst Town Admin / Town Planner
9	Treasurer/ Collector	Salaries	\$(9,500)	New Treas/Coll started mid-October
10	Treasurer/ Collector	Expenses	\$9,500	Interim Treas/Coll Contracted Services
30	Cable TV Advisory	Expenses	\$5,000	Verizon contract negotiation
65	Debt Service	Principal	\$15,000	Septic Loan Program
		<b>Totals</b>	<b>\$82,500</b>	

**ARTICLE :** To see if the Town will vote to rescind the borrowing authority for \$95,163 which constitutes the balance that is not going to be borrowed for the Police Station construction; Article 9 of the June 12, 2017 Annual Town Meeting.

**Assawompset School Renovations**

**ARTICLE :** To see if the Town will if the Town will approve the \$\_\_\_\_\_ borrowing authorized by the Freetown-Lakeville Regional School District for the purpose of paying costs of Assawompset Elementary School repairs, feasibility study thru schematic design, and for which the District may be eligible for a school construction grant from the Massachusetts School Building Authority (“MSBA”), said amount to be expended at the direction of the School Building Committee. The MSBA’s grant program is a non-

entitlement, discretionary program based on need, as determined by the MSBA, and any Study costs the District incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the District and its member municipalities. Any grant that the District may receive from the MSBA for the Study shall be as set forth in the Feasibility Study Agreement that may be executed between the District and the MSBA.

*NOTE: This article will only be proposed if the MSBA Board approves the ARP project at its October 27, 2021, meeting.*

### **Town Clerk Requested Articles**

**ARTICLE :** To see if the Town will vote to accept the provisions M.G.L. Chapter 41, Section 110A, authorizing the Town to treat Saturdays as a holiday; or act or do anything in relation thereto.

*Explanation: Acceptance of this MGL essentially allows the Town Clerk's Office to treat Saturdays as a legal holiday when calculating filing deadlines, such as voter registrations or submittal of nomination papers.*

**ARTICLE :** To see if the Town will vote to amend Lakeville General Bylaws, Chapter II, by adding section 18 Articles Seeking Special Legislation:

To enable adequate time for review, no article requesting that any board, committee, commission, council, other officer(s) of the Town or the public, petition the General Court to enact special legislation shall be in order for consideration by Town Meeting unless the text of the special legislation sought is included as part of the article or as an appendix to the warrant, or is on file with the Town Clerk at least fourteen (14) days prior to the date of the Town Meeting at which it will be considered.

*Explanation: This article seeks to avoid some of the confusion observed at the June 21, 2021 Special Town Meeting of the Freetown-Lakeville Lake District by ensuring that voters have the opportunity to look over proposed legislation prior to a town meeting.*

### **Community Preservation Act**

**ARTICLE: :** To see if the Town of Lakeville will vote to accept sections 3 to 7, inclusive, of Chapter 44B of the General Laws of Massachusetts, also known as the Community Preservation Act, (hereinafter "the Act"), and beginning in Fiscal Year 2023, to assess a one percent (1%) surcharge on real property for the purposes permitted by said Act, which include enabling the town to (1) acquire, create and preserve open space, which includes land for parks, recreational uses, conservation areas and the protection of drinking water supplies; (2) create and rehabilitate local parks, playgrounds, and athletic fields; (3) acquire, preserve, rehabilitate and restore historic buildings and resources; and (4) create and preserve affordable housing; and further to adopt the following exemptions from the surcharge: (a) property owned and occupied as a domicile by a person who qualifies for low income housing or low or moderate income

senior housing in the Town of Lakeville, as defined in Section 2 of said Act; (b) \$100,000 of the value of each taxable parcel of residential property; and (c) \$100,000 of the value of each taxable parcel of class three, commercial property, and class four industrial property as defined in GLc.59, section 2A. A taxpayer receiving a regular property tax abatement or exemption will also receive a pro rata reduction in the surcharge.

; or take any other action relative thereto

**ARTICLE:** To see if the Town will vote to reaffirm the vote at the June 13, 2005, Annual Town Meeting to adopt the Town's Community Preservation Committee bylaw, as published on the Town's website and on file at the office of the Town Clerk, and by amending Section-6 of said bylaw by striking its text, and replacing it with the following; or take any other action relative thereto.

Section 6: Effective Date

This Bylaw shall take effect upon the Town's acceptance of the Community Preservation Act in accordance with the procedures set forth in Chapter 44B of the General Laws and after all requirements of MGL Chapter 40 Section 32 have been met.

**Change to Select Board**

**ARTICLE:** To see if the Town will vote to amend the Bylaws of the Town of Lakeville to change the title of the "Board of Selectmen" to "Select Board" as follows, or take any other action relative thereto:

1. Amend Chapter III of the Town's General Bylaws, by changing the tile from "Selectmen" to "Select Board"
2. Delete the text of Section 9 of Chapter III and replace it with the following: "The Select Board shall have all the powers and duties of a Board of Selectmen for purposes of the General Laws and any special acts applicable to the Town of Lakeville. The Select Board shall have general direction and management of property and affairs of the town in all matters not otherwise provided for by law or these by-laws.
3. Delete the words "Board of Selectmen" or "Selectmen" in each place they appear in the Town's Bylaws and insert in their place "Select Board".

**Potential additional warrant(s): Earth Removal Bylaw, Marijuana Overlay Bylaw.**



**AGENDA ITEM #5  
AUGUST 30, 2021**

**DISCUSSION AND APPROVAL OF THE DRAFT MEMORANDUM OF  
AGREEMENT BETWEEN THE TOWN AND THE IAFF LOCAL 3188**

Ari has supplied the attached forms for your review.

**MEMORANDUM OF AGREEMENT BETWEEN  
TOWN OF LAKEVILLE AND  
LAKEVILLE PERMANENT FIREFIGHTERS ASSOCIATION, IAFF LOCAL 3188**

The Town of Lakeville (“the Town”) and the Lakeville Permanent Firefighters Association, IAFF, Local 3188 (“the Union”) (collectively, “the parties”) enter into this Memorandum of Agreement to correct an inadvertent error in the parties’ collective bargaining agreement that does not accurately reflect the parties mutual understanding of negotiations.

Accordingly, Article XXII, Section 1 is amended as follows:

**ARTICLE XXII**

**SECTION 1. E.M.T. RECERTIFICATION**

The Town shall reimburse EMTs covered by this Agreement for all re-certification and/or application fees. All training required by State law or regulation to be performed by EMTs and EMTPs (for re-certification, CPR. And DOT) shall be reimbursable. Such reimbursement is included as outlined in Article XXII Section 1 Specialization Pay.

All employees covered under this Agreement who hold a certified National and/or State E.M.T. rating shall be compensated in the following amounts added to their base pay annually:

Effective July 1, 2019, EMTB \$5,600

Effective July 1, 2019, EMTP \$9,200

Members who obtain a Certified Community Paramedic (CP-C) certification shall be entitled to the following additional ~~stipend~~ compensation in addition to their EMTP specialization pay, added to their base pay annually:

Effective July 1, 2020 \$1,000

Effective July 1, 2021 \$1,500

Effective July 1, 2022 \$2,000

TOWN OF LAKEVILLE  
By its Board of Selectmen

LAKEVILLE PERMANENT FIREFIGHTERS,  
IAFF, LOCAL 3188

\_\_\_\_\_  
Evagelia Fabian, Chair

\_\_\_\_\_  
Richard LaCamera

\_\_\_\_\_  
Lorraine Carboni

Date:

\_\_\_\_\_  
Date:

**MEMORANDUM OF AGREEMENT  
BETWEEN  
TOWN OF LAKEVILLE  
&  
LAKEVILLE PERMANENT FIREFIGHTERS, IAFF LOCAL 3188**

This Memorandum of Agreement is entered into by and between the Town of Lakeville ("Town") and the Lakeville Permanent Firefighters, Local 3188 ("Union"). All terms and conditions of the Collective Bargaining Agreement effective from July 1, 2020 through June 30, 2023 shall remain in effect except as modified by the following:

**1. ARTICLE XXIII TRAINING**

Add the following section:

**"SECTION 3. REIMBURSEMENT AGREEMENT**

All new Firefighters, hired after July 1, 2021, will be required to sign a Training Reimbursement Agreement with the Town using the form attached hereto as Attachment 'A', in which they agree to reimburse the Town for its training costs in the amounts set forth therein if they leave their position as a Firefighter prior to the completion of four (4) years from the Firefighter's date of hire."

**TOWN OF LAKEVILLE**

By its Board of Selectmen

LAKEVILLE PERMANENT FIREFIGHTERS, IAFF LOCAL  
3188

\_\_\_\_\_  
Evagelia Fabian, Chair

\_\_\_\_\_

\_\_\_\_\_  
Richard LaCamera

\_\_\_\_\_

\_\_\_\_\_  
Lorraine Carboni

\_\_\_\_\_

Dated: \_\_\_\_\_

**ATTACHMENT 'A'**  
**TRAINING REIMBURSEMENT AGREEMENT**  
**BETWEEN**  
**TOWN OF LAKEVILLE**  
**AND**  
**(Name of Candidate)**

This Agreement is made this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_ by and between the Town of Lakeville, acting by and through its Fire Chief ("Town"), and (insert name of Candidate) ("Firefighter Candidate").

1. The Firefighter Candidate understands that the Town is committing significant resources to send the Candidate to the Massachusetts Firefighting Academy and provide the Candidate with various training at the Town's expense. In consideration of the Candidate's attendance at the Firefighting Academy and the other training costs incurred by the Town, the Firefighter Candidate agrees to remain in the Town's employ as a Firefighter for a minimum of four (4) years from the Candidate's date of hire.
2. In the event the Candidate voluntarily resigns his/her employment prior to the completion of four (4) years of service with the Town as a Firefighter, the Candidate shall issue payment to the Town in the amount of Four-Thousand and 00/100 Dollars (\$4,000) as reimbursement for the training costs of incurred by the Town in connection with the Candidate's employment. Said payment shall be due and payable to the Town within thirty (30) days from the date of the Candidate's separation of employment.
3. The Candidate acknowledges that, by this Agreement, he/she has been advised, in writing, that he/she may consult legal counsel prior to signing the Agreement and that to the extent he/she has wanted to consult with legal counsel, he/she has done so.
4. The Candidate acknowledges that he/she has thoroughly read this Agreement, that he/she understands it, and that he/she is entering into it of his/her own free will.
5. This Agreement will be interpreted and construed for all purposes under the laws of the Commonwealth of Massachusetts.

TOWN OF LAKEVILLE,  
By its Fire Chief:

(EMPLOYEE NAME)

\_\_\_\_\_

\_\_\_\_\_

Dated: \_\_\_\_\_

Dated: \_\_\_\_\_

**AGENDA ITEM #6  
AUGUST 30, 2021**

**DISCUSS AND POSSIBLE VOTE TO APPOINT ERIKA CORREIA AS  
TREASURER/COLLECTOR**

Attached is a memo from Ari, cover letter and resume of Erika Correia for your review.



**TOWN OF LAKEVILLE**  
**Town Administrator's Office**  
346 Bedford Street  
Lakeville, MA 02347  
(508) 946-8803

RECEIVED  
AUG 24 2021  
SELECTMEN'S OFFICE

August 25, 2021

**TO:** Board of Selectmen  
**FROM:** Ari J. Sky, Town Administrator  
**SUBJECT:** Treasurer-Collector Position

The Board of Selectmen approved the position description for the Treasurer-Collector on June 12, 2021. The position was widely advertised on municipal job listing sites, social media and on the Town's website. The Town received five applications, one of whom subsequently withdrew.

Interviews were held the week of August 2<sup>nd</sup>. The interview panel consisted of Town Clerk Lillian Drane, Town Accountant Todd Hassett, Interim Treasurer-Collector Angela Chandler, Human Resources Director Clorinda Dunphy and me. I am pleased to inform you that the panel unanimously recommended Erika Correia (cover letter and resume attached) for the position.

Erika is currently the Treasurer-Collector for the Town of Dennis. Her previous experience includes five years as the Assistant Collector in Dartmouth, as well as stints in the Dartmouth Town Clerk's office and with the Town of Fairhaven. The panel was very impressed with Erika's background, experience, and demeanor, and she has completed all preemployment checks. I respectfully request that, in acknowledgement of her extensive government experience, the Town offer the budgeted salary of \$85,000. In addition, Erika earns three weeks' annual vacation in her current position: I would also request that she be provided the same in Lakeville to maintain her current rate of accrual.

The Special Act for the appointed Treasurer-Collector allows the Board of Selectmen to establish an employment contract with the appointed Treasurer-Collector. If the Board is amenable, I would request that the Board authorize the Town Administrator to negotiate and execute an initial one year agreement that complies with the Employee Personnel Handbook and the terms stated in the previous paragraph.

Thank you for your consideration. Please do not hesitate to let me know if you have any questions or would like to discuss this position.

*Attachments*

Erika L. Correia  
805 Russells Mills Road  
Dartmouth, MA 02748  
508-916-0368  
[Erikalynn1376@gmail.com](mailto:Erikalynn1376@gmail.com)

July 6, 2021

Town of Lakeville  
Clorinda Dunphy, Human Resources Director  
346 Bedford Street  
Lakeville, MA 02347

Dear Clorinda Dunphy,

I am interested in the Treasurer/Collector position, as advertised on the MMA's website. I am currently employed as the Treasurer/Collector for the Town of Dennis. I believe that the skills and knowledge I have gained in municipal government make me a well-qualified candidate for this job.

In addition to having a Bachelor of Science degree in Accounting, I am also a Certified Massachusetts Municipal Collector. I am currently looking to obtain my Treasurer's certification. I feel that my experience, education, and skill set put me in a position to meet the demands described in your job posting.

Thank you for your time and consideration.

Sincerely,

*Erika L. Correia*

Erika L. Correia

**ERIKA L. CORREIA**  
805 Russells Mills Road  
Dartmouth, MA 02748  
(508) 916-0368  
[erikalynn1376@gmail.com](mailto:erikalynn1376@gmail.com)

**OBJECTIVE:** To obtain the position of Treasurer/Collector for the Town of Lakeville.

**PROFESSIONAL EXPERIENCE:**

- 11/2019 – Current    **Treasurer/Collector, Town of Dennis**
- Oversees all Town collections
  - Maintains all Tax Title accounts
  - Assists Tax Title attorney with foreclosures
  - Assists taxpayers with payment plans and or complaints
  - Generates all Real Estate, Personal Property, Motor Vehicle & Boat commitments
  - Manages all Town debt
  - Prepares Treasurer/Collector budgets, including debt service
  - Prepares annual report
  - Processes weekly bank transfers relating to accounts payable and payroll
  - Reconciles all receivables and betterments with the Accounting Dept and Assessor's Dept
  - Prepares year-end reporting to DOR (Gateway reporting)
  - Oversees entire Sticker Sales operation (including Beach, Transfer, ORV)
  - Currently bonded
- 8/2014 – 10/2019    **Assistant Town Collector, Town of Dartmouth**
- Reconcile bank statements; process and approve weekly bank transfers
  - Generate all Real Estate, Personal Property, Motor Vehicle, Boat, Water/Sewer & Trash commitments
  - Generate all manual commitments, such as Supplemental Taxes
  - Process Tax Title for the Treasurer's Office
  - Assists/reviews MLCs
  - Processes all refunds on a weekly basis
  - Handle resident complaints/inquiries in a timely manner
  - Perform Tax Collector duties, including supervising staff, in the absence of Tax Collector
- 5/2011 – 8/2014    **Assistant Town Clerk, Town of Dartmouth**
- Process all Vital records, such as marriage, birth & death certificates
  - Process business certificates, raffle permits & genealogy requests
  - Election and Town Meeting work
- 8/2008 – 4/2011    **Principal Clerk, Collector's Office, Select Board's Office & Assessor's Office**  
Town of Fairhaven, Fairhaven, MA 02719
- 6/2003 – 7/2004    **Office Manager/Bookkeeper, Hawthorne Country Club, Dartmouth, MA**  
10/2002 – 8/2007    **Owner, Gold & Glow Tanning Salon, LLC, Dartmouth, MA**



**ERIKA L. CORREIA**  
805 Russells Mills Road  
Dartmouth, MA 02748  
(508) 916-0368  
[erikalynn1376@gmail.com](mailto:erikalynn1376@gmail.com)

**Accountant**

7/2004 – 7/2006

Hodgson, Pratt & Associates, PC, New Bedford, MA 02740

1/2002 – 11/2002

Meyer, Regan & Wilner, Fall River, MA 02722

9/1998 – 12/2001

Landa & Altsher, PC, Randolph, MA 02368

- Audit, review and compilation services
- Prepare financial reports/statements & various tax returns
- Reconcile and adjust accounts for monthly bookkeeping clients

**SOFTWARE KNOWLEDGE:**

Advanced knowledge of Munis, Vision, Invoice Cloud, Microsoft Excel and Microsoft Word

**EDUCATION:**

**BA in Accounting, University of Massachusetts Dartmouth, Dartmouth, MA**  
**Certified Massachusetts Municipal Collector, Amherst, MA**

**REFERENCES**

Available upon request

**AGENDA ITEM #7  
AUGUST 30, 2021**

**DISCUSS REQUEST FROM POLICE CHIEF AND POSSIBLE VOTE  
TO APPOINT JARED TAJE AS A POLICE OFFICER/CONSTABLE**

Attached is a memo from the Police Chief requesting appointment of Jared Taje as a Police Officer/Constable.

If appointed, the motion would be to appoint Jared Taje as a Police Officer/Constable, effective August 30, 2021 for a probationary term to expire August 30, 2022.



# LAKEVILLE POLICE DEPARTMENT

323 Bedford St.  
Lakeville, MA 02347



**Matthew J. Perkins**  
Chief of Police

**Phone: 508-947-4422**  
**Fax: 508-946-4422**

To: Board of Selectmen

From: Matthew J. Perkins  
Chief of Police

Date: August 17, 2021

Subject: Appointment of Police Officer

RECEIVED  
AUG 17 2021  
SELECTMEN'S OFFICE

Honorable Board,

I respectfully request the appointment of Jared Taje to the position of Police Officer / Constable for the Town of Lakeville. The appointment, effective August 30, 2021, will be for a probationary term to expire August 30, 2022. This position fills one of two vacant budgeted positions left open due to transfer.

Jared Taje, formally a Lakeville Police Officer, resigned in May of 2021 and accepted a position in the City of Taunton. Jared previously worked 7 honorable months in Lakeville, and is eager to return and again serve the community of Lakeville. Jared graduated the 3<sup>rd</sup> Recruit Officer Class at Fitchburg State University in 2020, where he also earned a bachelor's degree in criminal justice. Jared Taje will once again make an excellent police officer who will represent the Lakeville Police Department and the citizens of Lakeville with distinction. I respectfully request the appointment of Jared Taje to the position of Police Officer.

Respectfully,

Matthew J. Perkins  
Chief of Police  
Lakeville Police Department

**AGENDA ITEM #8  
AUGUST 30, 2021**

**DISCUSS REQUEST FROM DPW DIRECTOR AND POSSIBLE VOTE  
TO APPOINT MICHAEL JONES AS HEAVY MOTOR EQUIPMENT  
OPERATOR**

Attached is a memo from the DPW Director requesting that Michael Jones be appointed as a Heavy Motor Equipment Operator and Mr. Jones' resume for your review.

Mr. Moniz is requesting that Mr. Jones be hired at Level 2, Step 4, contingent on pre-employment screening.



## Town of Lakeville

Town Office Building  
346 Bedford Street  
Lakeville, MA 02347

RECEIVED  
AUG 26 2021  
SELECTMEN'S OFFICE

TO: Chairman Lia Fabian, Selectman Richard LaCamera, Selectman Lorraine Carboni  
FROM: Franklin Moniz, DPW Director  
DATE: August 25, 2021  
SUBJECT: Request to Consider Starting a New Employee at Level 2, Step 4

On August 24, 2021, DPW Deputy Director, Jim Lucas; HR Director, Clorinda Dunphy; and I interviewed Michael Jones (see attached resume) for one of the vacant Heavy Motor Equipment Operator (HMEO) positions that has been vacant for several months. As an experienced CDL driver (18 years), Michael is clearly qualified for this position. Additionally, he is planning to take the test for his hydraulics license within the next week. Also, all three of us felt that Michael would be a great fit for the DPW.

Michael is making over \$30 per hour at his current position driving for Cumberland Farms. He has to work the overnight shift, weekends and some holidays, so he is pursuing this position for a better quality of life.

The HMEO position falls on the Union Wage Scale as a Level 2 (see below). Even if we were able to hire Michael at the top step, he will still be taking a significant cut in pay. He has indicated that the lowest hourly rate he can start at is \$22.78/hour (4<sup>th</sup> step). See below.

HRLY NON EXEMPT STEPS	
	2
1ST	\$20.93
2ND	\$21.53
3RD	\$22.13
4TH	\$22.78
5TH	\$24.28
6TH	\$25.00

According to Article 16.4 of the Laborer's Union Contract, "the hiring rate shall be the minimum for the job unless otherwise authorized or designated by the Board of Selectmen." We believe in this instance it is necessary to make an offer at the 4<sup>th</sup> Step. This offer would of course be contingent on a pre-employment screening.

Presently there is a very competitive market for CDL drivers. The combination of the labor shortage, the uncompetitive wages we are able to offer, and the 50/50 contribution to an expensive health plan, we have been unable to recruit replacements. The DPW is in desperate need to fill these positions before the winter. I respectfully ask that you consider allowing us to make an offer at Step 4.

Thank you.

cc: Ari Sky, Town Administrator  
Clorinda Dunphy, HR Director  
Jim Lucas, DPW Deputy Director

# MICHAEL A JONES

---

61 Ridgewood Drive  
Taunton, MA 02780  
(508) 989-2698  
[cjones83001@hotmail.com](mailto:cjones83001@hotmail.com)

## Employment History

Cumberland Farms 4/2014 to current  
165 Flanders Rd,  
Westborough, MA 01521  
508-366-4445

- Strict follower on safety and all traffic rules
- Ability to deliver all products on time
- Familiarity with all the roads in the state
- Communicate with dispatching
- Deliver gasoline to stations
- Experience with Liquid Natural Gas

J.P. Noonan Transportation 3/2004-2014  
415 West Street  
West Bridgewater, MA  
508- 588-8026

- Loading and off-loading trailer
- Hauling gasoline, jet fuel, liquid asphalt, 2 oil, dump trailer and flatbed
- Delivery of products to various location and on a safe timely matter
- Pre-trip and post-trip on truck and trailer

Firestone Tire and Rubber Company 5/2001-2004  
120 US-44  
Raynham, MA  
508-692-9043

- Specialized in oil changes
- tire rotations
- brakes
- transmission services
- tire changes
- tire balances
- fuel systems services
- suspensions

## Education

New England Tractor Trailer School: CDL Class A 2003  
Taunton High School- Taunton, MA USA Diploma: 2002

## Licenses

- CDL A license with airbrakes endorsement
- DOT medical card
- Hazmat/ Tanker Endorsements
- TWIC card

**AGENDA ITEM #9  
AUGUST 30, 2021**

**REQUEST FOR A ONE-DAY SPECIAL LIQUOR LICENSE FOR THE  
LAKEVILLE LIONS FALL FAMILY FESTIVAL – SEPTEMBER 11,  
2021**

Attached is application from the Lakeville Lions Club for a one-day beer and wine special license for their event on September 11, 2021.

Also attached is a certificate of insurance for the vendor who will be serving the beer and wine showing liquor liability insurance.

RECEIVED  
JUL 13 2021  
SELECTMEN'S OFFICE

THE COMMONWEALTH OF MASSACHUSETTS

Town of Lakeville  
APPLICATION FOR LICENSE  
(GENERAL)

No. \_\_\_\_\_

JULY 8<sup>th</sup> 2021

TO THE LICENSING AUTHORITIES:

The undersigned hereby applies for a License in accordance with the provisions of the Statutes relating thereto  
LAKEVILLE LIONS CLUB

(Full name of person, firm or corporation making application)

STATE CLEARLY  
PURPOSE FOR  
WHICH LICENSE  
IS REQUESTED

To ONE DAY BEER AND WINE SPECIAL LICENSE FOR FALL  
FAMILY FESTIVAL FROM 12PM TO 5PM ON SEPTEMBER 11<sup>th</sup>, 2021.

GIVE LOCATION  
BY STREET  
AND NUMBER

At 170 MAIN STREET

in said City of LAKEVILLE  
Town

in accordance with the rules and regulations made under authority of said Statutes.

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

LAKEVILLE LIONS CLUB

\*Signature of Individual  
or Corporate Name (Mandatory)

By: Corporate Officer  
(Mandatory, if Applicable)

\*\*Social Security # (Voluntary)  
or Federal Identification Number

\* This license will not be issued unless this certification clause is signed by the applicant.

\*\* Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licensees who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Mass. G.L. c. 62C s. 49A.

Received \_\_\_\_\_ 20 \_\_\_\_\_

Hour A.M. \_\_\_\_\_

P.M. \_\_\_\_\_

Approved \_\_\_\_\_ 20 \_\_\_\_\_

WILLIAM COMEAU 

Signature of Applicant

85 VAUGHAN STREET, LAKEVILLE, MA 02347

Address

License Granted \_\_\_\_\_ 20 \_\_\_\_\_





BERKBEE-02

LBROWN

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/18/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER <b>FBinsure, LLC</b> 128 Dean Street Taunton, MA 02780	CONTACT NAME:		PHONE (A/C, No, Ext): <b>(508) 824-8666</b>		FAX (A/C, No): <b>(508) 880-0142</b>
	E-MAIL ADDRESS: <b>info@fbinsure.com</b>				
INSURER(S) AFFORDING COVERAGE				NAIC #	
INSURER A : <b>Employer's Mutual Casualty Company</b>				<b>21415</b>	
INSURED  <b>Berkley Beer Company Inc</b> 10 Ingell St Taunton, MA 02780					
INSURER B :					
INSURER C :					
INSURER D :					
INSURER E :					
INSURER F :					

COVERAGES	CERTIFICATE NUMBER:	REVISION NUMBER:
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THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
<b>A</b>	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>Blkt Add'l Ins</b> <input checked="" type="checkbox"/> <b>Blkt Waiver</b>  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			<b>6X07805</b>	<b>7/8/2021</b>	<b>7/8/2022</b>	EACH OCCURRENCE \$ <b>1,000,000</b> DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>500,000</b> MED EXP (Any one person) \$ <b>10,000</b> PERSONAL & ADV INJURY \$ <b>1,000,000</b> GENERAL AGGREGATE \$ <b>2,000,000</b> PRODUCTS - COMP/OP AGG \$ <b>2,000,000</b> <b>Liquor Liab</b> \$ <b>1,000,000</b> COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						\$ \$ \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below			<b>N/A</b>			PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Commercial Auto Policy includes Hired & Non owned Auto Coverage.

Safeway Inc., Albertson's LLC, and New Albertson's Inc. are listed as additional insured.

CERTIFICATE HOLDER	CANCELLATION
--------------------	--------------

<b>Lakeville Lions Club</b> 170 Main St Lakeville, MA 02347	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE <i>Jaritta L. Brown</i>
---	--

**AGENDA ITEM #10  
AUGUST 30, 2021**

**REVIEW AND VOTE TO ACCEPT LETTER OF RESIGNATION FROM  
BRENDA CARTER FROM THE COUNCIL ON AGING**

Attached is a letter from Brenda Carter resigning from the Council on Aging for your acceptance.

Brenda served as an alternate member.

## Tracie Craig-McGee

---

**From:** Kelly Howley - Council on Aging Director  
**Sent:** Wednesday, August 4, 2021 10:21 AM  
**To:** Tracie Craig-McGee  
**Subject:** Resignation

Hi Kelly

I have given this some thought, and regretfully i think it best that I withdraw as an alternate. I don't think I'll be able to deliver the support that would and should be required to the board . Perhaps at another time I'll be better able to serve the town

Thank you

Brenda Carter

*Kelly Howley*  
*Lakeville COA Director*  
*508-947-7224*

**AGENDA ITEM #11  
AUGUST 30, 2021**

**REQUEST FROM SOUTH SHORE RACE MANAGEMENT TO HOLD  
MULLEIN HILL RUN FOR VETERANS 5K ON NOVEMBER 6, 2021**

Attached is a request from South Shore Race Management to hold the Mullein Hill Run for Veterans 5K on November 6, 2021. This is a fundraising event for Mullein Hill School and local Veterans' Organizations.

As of the date of copying the agenda packets, we have not received the sign offs from the Fire and Police Chiefs. They have requested a DOT Parade Permit, but we have not received it yet.

Would the Board like to table this until the September 20<sup>th</sup> meeting and I will follow up with them to get the necessary approvals.

RECEIVED  
AUG 17 2021  
SELECTMEN'S OFFICE



August 16, 2021

Board of Selectmen  
Town of Lakeville  
346 Bedford Street  
Lakeville, MA 02347

We are requesting the use of public roads to hold the Mullein Hill Run for Veterans 5K (3.1 mile) road race at 9:00 am on Saturday, November 6<sup>th</sup>, 2021, as a fundraising event for the school as well as local Veterans organizations. The race will begin and end at the school located on Staples Shore Road.

We would like to place mile markers and directional arrows along the course. These are temporary signs that would be setup at 7:00 am on race day and removed as soon as the race finishes.

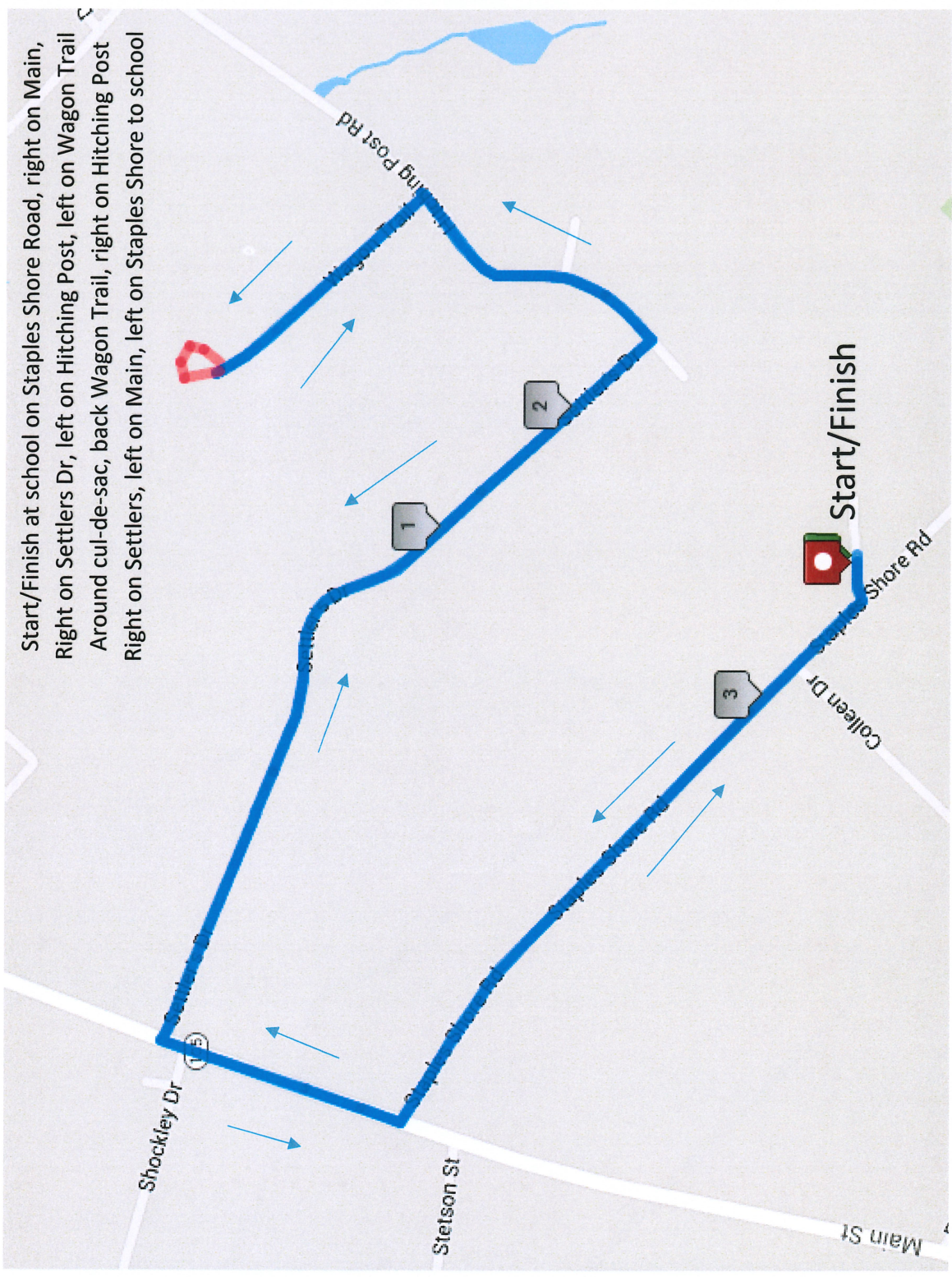
Attached please find a copy of the course map with route directions. If you require further information or details about the event, please contact me at [southshorerace@gmail.com](mailto:southshorerace@gmail.com) or (781) 820-6161. Copies of the course map and request letter have been copied to both the police and fire departments.

Thank you!

*Anne Marie Winchester*

Anne Marie Winchester  
South Shore Race Management  
PO Box 1480  
Duxbury, MA 02331  
(781) 820-6161

# MULLEIN HILL RUN FOR VETERANS 5K



**AGENDA ITEM # 12**  
**AUGUST 30, 2021**

**DISCUSS SCHEDULING BOARD OF SELECTMEN MEETING  
DATES FOR THE REMAINDER OF 2021**

Ari would like the Board to consider scheduling your meeting dates for the remainder of the year.

Suggested dates are:

September 20, 2021

October 12 (this is a Tuesday as October 11 is Columbus Day)  
and October 25, 2021

November 15, 2021

December 13, 2021

**AGENDA ITEM #13  
AUGUST 30, 2021**

**NEW BUSINESS**

**Possible Discussion on Animal Shelter Boarding fees**

Last year, the Board requested that a discussion be held prior to the renewal of the boarding contracts for the Animal Shelter regarding increasing the fees. Currently the daily board rate is \$15.00 per day with a drop off fee of \$20.00.

I have attached a summary of the fees received for FY21 from the Towns that utilized the shelter in FY21.

If the Board would like to raise the fees, David Frates, ACO, has recommended an increase of \$20.00 per day for daily board with an increase of \$25.00 for the drop off fee.



**ACO BOARDING FEES COLLECTED  
FY2021**

ACUSHNET	\$ -
BERKLEY	\$ 360.00
BRIDGEWATER	\$ 380.00
CARVER	\$ 375.00
FREETOWN	\$ 1,920.00
ROCHESTER	\$ 105.00
RAYNHAM	\$ 15.00
WAREHAM	\$ 3,645.00
HANSON	\$ 70.00
<b>TOTAL</b>	<b>\$ 6,870.00</b>

**AGENDA ITEM #14  
AUGUST 30, 2021**

**OLD BUSINESS**

**AGENDA ITEM #15  
AUGUST 30, 2021**

**ANY OTHER BUSINESS THAT CAN PROPERLY COME  
BEFORE THE BOARD OF SELECTMEN**

## **OTHER ITEMS**

1. Letter from Division of Fisheries & Wildlife regarding Natural Heritage Atlas
2. The Voice of the Retired Public Employee



MASSWILDLIFE

## DIVISION OF FISHERIES & WILDLIFE

1 Rabbit Hill Road, Westborough, MA 01581  
p: (508) 389-6300 | f: (508) 389-7890  
[MASS.GOV/MASSWILDLIFE](http://MASS.GOV/MASSWILDLIFE)

DATE: July 26, 2021  
TO: Conservation Commission, Building Inspector, Planning Board  
RE: Publication of the 15<sup>th</sup> Edition Natural Heritage Atlas (Priority & Estimated Habitat Map of rare species), effective August 1, 2021

Pursuant to the Massachusetts Endangered Species Act (MESA, M.G.L. c. 131A) and its implementing regulations (321 CMR 10.12), the Natural Heritage and Endangered Species Program (NHESP) of the Division of Fisheries and Wildlife would like to inform you of the availability of the 15<sup>th</sup> Edition Natural Heritage Atlas, effective August 1, 2021.

Access to Priority and Estimated Habitat maps is provided through a variety of sources:

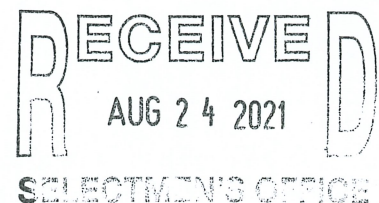
- An interactive map viewer with address-matching capability is available online
- GIS datalayers for both Priority and Estimated Habitat can be downloaded from MassGIS (appropriate software required for use)
- Large-scale PDF maps for each Town containing Priority Habitat are available for download, viewing, or printing
- A large-scale Town map may be purchased from NHESP

Links to the above resources can be found on our website at:  
[www.mass.gov/service-details/regulatory-maps-priority-estimated-habitats](http://www.mass.gov/service-details/regulatory-maps-priority-estimated-habitats)

Please note it is the responsibility of the landowner or project proponent to determine if their project falls within Priority or Estimated Habitat and requires review. Failure to file under MESA constitutes a violation of the Act and is subject to a fine (pursuant to 10.06). We ask that the Towns assist directing proponents to the above resources as applicable.

If you have additional questions regarding this notification, please contact NHESP at [natural.heritage@mass.gov](mailto:natural.heritage@mass.gov) or (508) 389-6360.

**Thank you for working with us to protect the Commonwealth's state-listed species.**



MASSWILDLIFE

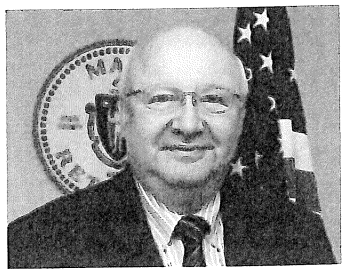


# THE VOICE

OF THE RETIRED PUBLIC EMPLOYEE

11 BEACON STREET, BOSTON, MASSACHUSETTS 02108-3024 | (617) 723-7283 | WWW.MASSRETIREES.COM

SEPTEMBER 2021



FRANK VALERI

## *President's Message* SHARE THE SUCCESS

There is no question that the tremendous investment success of the Commonwealth and local retirement systems should be celebrated. When modern pension funding schedules were implemented in the mid-1980s, no one could have envisioned the high level of asset gains that would come to fruition over the ensuing 36 years.

Given the fact that Massachusetts public employees do not participate in Social Security, the investment success of our public pension

### RETIREES SHOULD ALSO BENEFIT FROM ASSET GAINS

systems is extremely important. For most public retirees, their pension is the primary – if not only – source of retirement income.

As we spell out in the accompanying article below, payroll contributions from active employees (now averaging some 10% of salary) have steadily accelerated pension

funding since the mid-1970s. The state, along with most cities and towns, did not begin to properly fund the employer's pension contribution until pension funding reform in the mid-1980s.

Thirty-six years later, it is clear that these funding reforms not only worked, but far exceeded the most optimistic expectations. Those pension and retirement policy officials working within the Massachusetts' systems for the past four decades should be applauded for a job well

CONTINUED ON PAGE 3 ►

## AGGRESSIVE FUNDING & PROPER INVESTMENT MEET GOALS

When the proper funding of our 104 public retirement systems began in 1985, the majority of Massachusetts systems were woefully underfunded. Back then the Commonwealth was the 2nd worst unfunded system in the country – second only to West Virginia!

Today, some 35 years later, the situation is starkly different. Without exception, all 104 systems are on track to be fully funded by 2040, the state's statutory deadline. However, nearly 1/3 systems are now on pace to be fully funded by the end of this decade, a full 10-years ahead of

### *Pension Systems On Target For Full Funding*

schedule.

The success of our public pension systems is due to three key factors: high employee contributions, a commitment to proper employer funding, and strong investment returns.

This amazing progress is attributable, at least in large part, to the high level of pension contributions paid by active employees since 1975, when the contribution rate for

new hires jumped from 5% to 7% of salary. Social Security, in which Massachusetts public employees do not participate, has charged a contribution rate of just 6.2% since 1983. The Massachusetts rate then jumped to 8% in 1984 and 9% in 1996. Employees with salaries over \$30,000 pay an additional 2%.

Since July 1, 2001, teachers participating in Retirement Plus contribute a flat 11% of their salary into the Mass. Teachers Retirement System. State Police, hired on or after 1/1/96 contribute a flat 12%. These two

CONTINUED ON PAGE 2 ►

# Pension

CONTINUED FROM PAGE 1 ►

contribution rates are among the highest in the country and nearly double that required under Social Security.

Employee contributions, combined with the efforts of the legislature, governor, treasurer, and auditor – along with organizations like *Mass Retirees* and the public employee/teacher unions for nearly four decades – to maintain funding of the employers' share of the pension obligation has made a profound difference since 1985. That's about when the modern pension funding schedule was largely adopted across Massachusetts.

A long list of local officials also helped lead the way in committing to fully funding annual pension appropriations, instead of allocating local tax dollars elsewhere. For instance, the City of Boston is now close to full pension funding due to the efforts of former Mayors Ray Flynn, Tom Menino and Marty Walsh to closely adhere to the city's aggressive pension funding schedule. Towns, like Wellesley, benefited greatly from forward-thinking local officials such as Arnold Wakelin, who focused on funding the town's pension obligations well before it was popular to do so.

## EXCEPTIONAL INVESTMENT RETURNS

Arguably, the span of the past ten years has brought the best

investment returns of the 35-year running tally dating to 1985. As the charts on pages 9-11 illustrate, across all 104 retirement systems the 1, 5, 10 and 36-year investment returns far exceed benchmarks.

Over the past decade predictions by economists and investment consultants of a slowing global economy have led to a dramatic lowering of the assumed rate of investment return for the state, teachers and local retirement systems. Assumed rates of return, which had been as high as an annualized rate of 8.50% in 2012, have been lowered as far as 5.50% (Leominster). The Commonwealth's PRIM Board now uses an assumed rate of 7%, down from 8.25% in 2012.

Now 100% fully funded, Leominster posted a return of 12.63% in 2020. The city's 5, 10 and 36-year returns are 10.37, 9.31 and 8.76% respectively. During that same period PRIM returned 12.61, 10.42, 8.97 and 9.62% respectively. Annualized, both system's returns are significantly higher than the assumed rate and far exceed the rates needed to fully fund the systems.

The latest composite returns across all 104 retirement systems demonstrate strong investment returns that far outpace expected annualized rates of return.

"What an amazing degree of success our retirement systems have demonstrated over the past 36 years. Back in 1985, no one could have envisioned where we would be in 2021. However, the groundwork that was laid back then and in

subsequent years through the pension funding schedules, retirement law, oversight and sound investment practices have really paid off," remarks Association President Frank Valeri, also an elected member of the State Retirement Board. "A large degree of the credit for where we find ourselves today has to go to my predecessor Ralph White, who founded *Mass Retirees* in 1968. Being a force of nature, Ralph played a defining role in the creation of the modern retirement systems and ensuring that the government maintained its commitment to fully fund its share over the years.

"Given the results of the past decade, combined with what we are currently witnessing in 2021, we now know that predictions of an economic slowdown as the means to justify a far more conservative investment return assumption were just plain wrong. While the past does not dictate the future, it should be clear that the assumed rate of return is likely lower than is necessary and should not be reduced further. The facts simply do not justify going any lower."

Pension funding schedules are based on a series of assumptions designed to accurately predict the future financial obligations to be placed on the retirement system and ensure the fund's sustainability over time. These assumptions, which include asset returns, member life expectancy, wage inflation, among other factors, including the annual COLA, are updated every two years.

## Retirement System Investment Returns: *Explanation of Variations*

This month's edition of *The Voice* contains detailed investment return and funded ratio information for all 104 public retirement systems (see pages 9-11 & 16). While this information is instructive in examining the overall fiscal health and success of our retirement systems since 1985, the individual numbers do not provide an explanation of the variations in returns and funded levels between each individual retirement system.

Beyond sound investment practices

(which each system practices), individual returns vary due to differences in investment strategy and the long-term goals of the system. Individual asset allocation, risk exposure, funded ratio and length of pension funding schedule have a direct impact on annual returns.

How aggressively the government entity has funded the employer's contribution also has a direct impact on the system's funded ratio.

"It is important to point out that differences exist in how each retirement

system approaches investing, as well as how the government entity has approached meeting its own obligations. The one true constant across all systems is the employee contributions, which are firmly set by statute. Most of the other factors that go into funding the systems can and do vary," explains *Mass Retirees* CEO Shawn Duhamel, who previously served as a member of the Town of Plymouth Retirement Board.

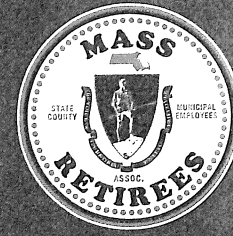
# ANNUAL MEETING POSTPONED

## Rise in COVID-19 Cases Cause for Concern

**D**ue to increased public health concerns regarding the rise of COVID-19 cases, *Mass Retirees* has decided to postpone our Annual Meeting scheduled for Friday, September 17, 2021. While we have yet to set an alternative date, the hope is to hold an in-person Annual Meeting before the end of the year.

"In good conscience, we cannot hold an indoor meeting with several hundred retirees at the same time as the COVID-19 case count is on

the rise. Even though most of our members have been vaccinated, there is still risk – especially from the Delta variant," states *Mass Retirees* President Frank Valeri. "No one is happy to have to postpone this meeting, especially me. We have come too far over the past 15 months to let our guard down and hold a meeting that could place our members in harm's way. Time will come when we can safely gather again, hopefully before the end of 2021. Meanwhile, we will continue to hold virtual

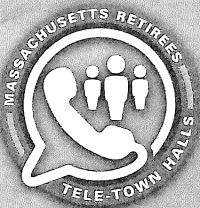


Tele-Town Hall meetings to keep our members informed and engaged.

"I also want to ask those members who

have not yet been vaccinated to please do so. The vaccines have proven to be both safe and effective. They also offer the best chance we have at controlling COVID-19 and getting life back to normal. If you have questions or concerns about the vaccines, speak with your doctor. Don't rely on 2nd and 3rd hand information. Speak with a trusted expert source for all medical advice."

## UPCOMING TELE-TOWN HALL MEETING



### TO PARTICIPATE:

**AUTO-CONNECT:** By simply answering a call from us (833-491-0336) at the time of the event. Simply answer the call and remain on the line to join the meeting.

**DIRECT DIAL:** *Mass Retirees* members can also directly dial into the tele-town hall meetings, at the time of the event, by calling 833-491-0336.

SEPTEMBER 17, 2021

(Friday) AT 1:00PM

**MASS RETIREES**  
FALL UPDATE

## President

CONTINUED FROM PAGE 1 ►

done.

Since 1985, the Commonwealth's Pension Reserves Investment Management (PRIM) Board has earned an average of 9.62%. This is more than 2.6% higher than the system's current assumed rate of return, which places Massachusetts on an aggressive pace to fully fund its pension obligations by 2036 – if not sooner.

Statewide, the pension funding outlook is just as strong across all 104 public retirement systems with the composite 36-year return coming in at 9.32%.

Combined, these returns have generated billions in excess investment gains that are well above the

levels needed to fully fund the retirement systems.

The 1, 5, 10 and 36-year returns also serve to throw cold water on predictions of a global economic slowdown that would result in suppressed asset gains. These predictions, which took hold in the aftermath of the Great Recession, have resulted in the Commonwealth and many local retirement systems significantly reducing the assumed annual rate of investment return.

Since 2013, the state has reduced PRIM's assumed rate of return by 1.25%, from 8.25% down to 7% in 2021. This has directly impacted the system's unfunded liability, adding nearly \$11 billion in new liabilities in just 9 years which has resulted in suppressing the funded ratios of the State and Teachers' Retirement

Systems.

With the historically high investment gains experienced as the world emerges from the global pandemic, it is time to pause any further reductions in the assumed rate of investment return. The evidence simply does not support predictions of a domestic or international economic slowdown.

It is also about time that the tremendous asset gains of our retirement systems be shared with public retirees – the very people who worked to fund the system and who now rely on the system.

It is no secret that our retirees are finding it increasingly difficult to make ends meet. Despite the compounding effect of the annual COLA, the modest yearly increase

CONTINUED ON PAGE 17 ►



# WEP REFORM LATEST DEVELOPMENTS

*Coalition Building Drives Congressional Support*

A critical element to the work being done to pass legislation reforming the Social Security Windfall Elimination Provision (WEP) has been the construction of a true nationwide coalition of public retiree and active employee organizations, whose members are harmed by the WEP.

In the July edition of *The Voice*, we reported that some 52 groups had publicly endorsed H.R. 2337, Congressman Richard Neal's WEP reform proposal. Since then, several additional organizations have joined our efforts, including our close allies the Mass. Police Association (MPA). Public retiree organizations from across California have also become

increasingly engaged with pressing for passage of the bill, bringing tens of thousands of retirees to the fight.

"Like our Association, these groups are not new to the issue of the WEP or even advocating for it to change. What is new for 2021 is the fact that we are now working together in close communication and a coordinated manner. We are also in 100% agreement that the most likely vehicle to bring relief to our members, as well as fix the WEP for future generations of retirees, is Chairman Neal's proposal," explains *Mass Retirees* Chief Executive Officer Shawn Duhamel. "The fact that at the end of July we had 175 House cosponsors for H.R. 2337 is proof

positive that our growing coalition is having an impact. Calls, emails, and letters from our combined membership are making all the difference. The key is to keep the pressure on until we succeed."

On Capitol Hill, talks continue between Democrats and Republicans in the House over joining together behind a unified approach to WEP reform. As we have previously reported, a difference of opinion rests with how the new Social Security formula would be applied to future retirees and whether to sunset the hold harmless

CONTINUED ON PAGE 8 ►



## PAC DRIVE DRAWS STRONG MEMBER RESPONSE

Each spring, our Association launches the annual voluntary fundraising drive for our Retired Public Employees Political Action Committee (PAC).

Once again, our members responded with great generosity. We are happy to report that, year-to-date through July, more than 12,000 members have each made an average contribution of \$22.00.

As members know, the PAC can only be used to support the Association's political interests within Massachusetts at the state and local levels. It is not a federal PAC, therefore the fund cannot be used to support federal candidates (President, US Senate, Congress) or toward national issues like Social Security WEP reform.

The sole purpose of the Public

*THANK YOU  
For Your  
Support*

Retirees PAC is to serve as the political arm of *Mass Retirees*. This entails not only supporting candidates who support public retirees and issues of direct importance to our members, such as the COLA and retiree health insurance, but also help educate and engage members in the issues impacting your retirement.

"First, I want to thank those members who chose to make a contribution to the PAC. Your generosity goes a long way toward making sure

that we have the resources to defend retiree rights and promote the betterment of the retirement system," explains Association President Frank Valeri. "Since our founding in 1968, politics have played an important role in the formation of retirement benefits. A well-funded PAC allows us to compete on the same level as private corporations and other monied interests on Beacon Hill."

Members who have not yet donated to the PAC in 2021 can still do so through the end of the year. Donations can be made online at [www.MassRetirees.com](http://www.MassRetirees.com) or by mail. In addition, a 2nd PAC notification will be mailed in September to those members who have not yet donated in 2021.

# U P D A T E S

## LEGISLATIVE

### NEWS

#### PUBLIC SERVICE HEARS ASSOCIATION BILLS

**W**e are eight months into the 2021-2022 legislative session, and the State House remains closed to the public. We are anticipating that this will continue into the fall and many of the functions of the legislature will remain virtual. This includes committee hearings, such as those by the all-important Joint Committee on Public Service.

As we go to print, committees have begun to ramp up their virtual public hearing schedules. During a Public Service hearing on insurance and pension investment legislation, *Mass Retirees* submitted testimony on six Association sponsored bills.

The first bill was in the pension investment category, **H2607: An act relative to public retiree COLA financing**, filed by Representative Mark Cusack (D-Braintree). In 1997, the State Legislature created two separate COLA laws – one for state and teacher retirees (Section 102) and one for local retirees (Section 103). And since then, our members have been well served by these laws. That said, the Association continues to advance proposals to enhance COLA benefits (see President's Message, p. 1) including this new initiative. Our bill creates a separate COLA Reserve Fund in each of the 104 state, teachers' and local retirement systems. A system will make deposits into the Reserve Fund, depending upon the return on investment of its pension fund. If a system's investment return exceeds its assumed (projected) rate of return, then a proportional share of the excess investment return, that is attributable to retiree/employee contributions in the pension fund, will be deposited in the Reserve Fund for future COLA liabilities.

In addition to this COLA financing legislation, several pieces of legislation, related to pension divestment, also received a public hearing. For more information on this topic see page 18.

Under the category of insurance, we offered testimony on 5 pieces of legislation. The first was **H2615/S1766: An act relative to health insurance for surviving spouses** filed by Representative Marjorie Decker (D-Cambridge) and Senator Marc Pacheco (D-Taunton) would establish a minimum contribution rate by local governments and also allow for

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## STATE FY22

### BUDGET

#### NEW STATE & TEACHER COLA

**O**n July 16th, 16 days after the start of Fiscal Year 2022, Governor Baker signed the FY22 state budget. The \$48.1 billion budget was approved unanimously by both House and Senate members. While this fiscal year's budget process ran on the normal cycle, leadership approached the process with cautious optimism as we slowly began to emerge from the pandemic.

The conference committee report that was approved reflected significant changes to the economic outlook. The spending bill, which was increased by approximately \$300 million after revenue estimates were increased by \$4.2 billion, allowed House and Senate negotiators to emerge with a spending bill that makes significant investments in the Commonwealth.

The FY22 budget includes the approval of 3% COLA for eligible state and teacher retirees (retiring before July 1, 2020). This marks the 23rd consecutive year that a COLA has been approved. Despite the timing of the budget's signing, the COLA will be retroactive to July 1, 2021 and most importantly, will be in the July pension direct deposits and checks. The conference committee report also included the full funding of the Group Insurance Commission that was contained in the three prior versions from the Governor and both legislative branches. Copays and deductibles will remain stable for this fiscal year.

The increase in revenue allowed for House and Senate leaders to earmark additional funding to areas that would put the long-term fiscal health of the Commonwealth on better footing. This included a \$1.2 billion infusion into the rainy-day fund, bringing the fund to \$5.2 billion. This transfer is a dramatic shift from just a few months ago when the plan was to utilize \$1.5 billion from the fund to shore up operations. Another significant move was the decision to transfer an additional \$250 million into the Commonwealth's Pension Liability Fund for the State and Teachers' retirement systems.

The conference committee report also contained language that would permanently increase the post retirement work hours from 960 to 1200 hours in a calendar year. The language, which was secured in the House budget by Representative Mark Cusack (D-Braintree), was included as part of the conference committee report. The change in the hours reflects the more traditional 20-hour part-time work week. It

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# Six Local Systems Increase COLA Base

## ASSET GROWTH SHARED WITH RETIREES

All but one of the state's 104 public retirement systems approved a 3% COLA for FY22, to be paid on a COLA base ranging from \$12,000 to \$18,000 (see charts below, as well as pages 9-11 and 16 for details).

Six retirement systems, with the approval of their respective local legislative bodies, opted to increase the COLA base for FY22. To date, a total of 81 public retirement systems have increased the COLA base beyond the \$12,000 established in 1998.

The value of the 3% COLA increases \$30 for each \$1,000 increment in the COLA base. For example, a 3% COLA on the \$12,000 base established in 1998 represents an additional \$360 annually. When paid on a \$13,000 base the COLA grows to \$390, then to \$420 at \$14,000 and so on.

Under the state retirement law

(Chapter 32), all COLAs become a permanent part of a retiree's pension. This compounding cumulative impact substantially grows retirees' base pensions over time.

The Blue Hills Regional and Methuen Retirement Systems have joined Barnstable County, Bristol County, Hampden County, Montague and Norfolk County retirement systems in providing an \$18,000 base. Members of these retirement systems received a \$540 annual COLA for FY22.

Concord and Malden each jumped their respective COLA bases by \$2,000, respectively, to \$12,000 and \$14,000. Neighboring communities Lynn and Swampscott each increased their local bases by \$1,000, coming in at \$15,000 and \$14,000 for FY22.

While the COLA base for State and Teacher retirees remains at

\$13,000 for FY22, this marks the 23rd consecutive year in which a 3% COLA has been paid. As is the case with local COLA benefits, the State and Teacher COLA is also cumulative and can never be taken away.

In addition, the unprecedented historic success of the Commonwealth and local pension investments creates an environment in which COLA benefits can be improved without the need for increased appropriations or changes to the pension funding schedules (see articles, page 1).

### INTENTIONALLY AT \$12,000

Unfortunately, not all retirees have reason to celebrate when it comes to the COLA base. 23 municipal retirement systems continue to

CONTINUED ON PAGE 7 ►

## MAXIMUM COLA BASE

### \$12,000 Base

Amesbury  
Andover  
Beverly  
Braintree  
Brockton  
Chelsea  
Fall River  
Fitchburg  
Framingham  
Lawrence  
Leominster  
Marblehead  
Marlborough  
Melrose

New Bedford  
Newburyport  
Newton  
Salem  
Shrewsbury  
Southbridge  
Weymouth  
Winthrop

### \$13,000 Base

Attleboro  
Belmont  
Brookline  
Danvers  
Gardner

Hampshire County  
Haverhill  
Hull  
Milford  
Minuteman RSD  
Natick  
North Adams  
Northampton  
Revere  
Springfield  
State  
Stoneham  
Teachers  
Watertown  
West Springfield

Westfield  
Worcester

### \$14,000 Base

Adams  
Berkshire County  
Boston  
Clinton  
Concord\*  
Dukes County  
Easthampton  
Essex County  
Everett  
Fairhaven  
Falmouth

pay a COLA on the same \$12,000 base set by the legislature with the passage of the COLA reform law, Chapter 17, Acts of 1997.

Some of these systems, such as Leominster, have at times even balked at paying the annual 3% COLA – despite being at or near fully funded.

“Following the tremendous asset gains witnessed over the past year, at least 7 or 8 of the systems that maintain a \$12,000 COLA base are now at a funded level above 75%. It is entirely unfair that the success of these systems is not being adequately shared with the members of the system,” said *Mass Retirees* President Frank Valeri. “I do know that the elected members of several of these 23 systems are actively working with local officials to increase the base. It goes without saying, but we are available to help out in any way we can.

“However, there are also a handful of systems that are dominated by local officials with their own agendas that are not favorable toward public retirees. In some limited cases, they have actively worked to undermine the local retirement systems. Let

them be on notice that we’re not going to remain silent while local retirees suffer.”

**MASSPORT STANDS ALONE AT 1.3%**

Citing the financial fallout from the COVID-19 pandemic that has negatively impacted air travel and commerce moving through shipping ports, the Massport Retirement Board opted to grant just a 1.3% COLA for FY22 on a \$14,000 base. The 1.3% is based on the 2020 CPI, which was paid by Social Security in January 2021.

Massport’s 849 retirees were not notified of the Board’s decision to pay the CPI amount rather than the full 3%, as allowed by law, until late July.

Despite the Board having referenced the Port Authority’s budget constraints as reason for paying a COLA of less than 3%, the decision to reduce the FY22 benefit has no impact on the system’s budget appropriation whatsoever.

Like nearly every public pension system operating within Massachusetts, Massport assumes the payment of an annual 3% COLA

within its pension funding schedule. This means that the funding for the COLA is built into the overall appropriation, which is paid independently of annual spending decisions. Any potential savings from reducing a COLA payment, if any, will not be realized until the system’s next valuation in 2022.

“In the midst of a pandemic, with inflation rising, Medicare costs up and housing costs in Massachusetts at an all-time high, the decision to reduce the COLA could not have come at a worse time for retirees. Not to mention the fact that there is no financial justification for not paying the full 3% COLA, especially when the Massport retirement system has experienced a decade of incredible investment returns,” comments *Mass Retirees* CEO Shawn Duhamel. “Massport saw an investment return in 2020 of 16.78%, the same period of time they are using as an excuse to reduce benefits. They have a 5-year return of 11.21%, with 10 years coming in at 9.24%. Not to mention the fact that the system is fully funded and could essentially run itself.”

**104 RETIREMENT BOARDS**

Gloucester  
Greenfield  
Hingham  
Holyoke  
Lexington  
Massport 1.3%  
Needham  
North Attleboro  
Northbridge  
Norwood  
Pittsfield  
Plymouth  
Reading  
Saugus  
Somerville

Swampscott\*  
Wakefield  
Waltham  
Winchester  
Woburn  
  
**\$15,000 Base**  
Arlington  
Chicopee  
Dedham  
GLSD  
Lynn\*  
Maynard  
MHFA  
MWRA

Milton  
Peabody  
Quincy  
Taunton  
  
**\$16,000 Base**  
Cambridge  
Malden\*  
Medford  
Middlesex County  
Plymouth County  
Webster  
Worcester County

**\$17,000 Base**  
Franklin County  
Lowell

**\$18,000 Base**  
Barnstable County  
Blue Hills RSD\*  
Bristol County  
Hampden County  
Methuen\*  
Montague  
Norfolk County  
Wellesley

*\*Changes since our September 2020 report*

# BERKSHIRE COUNTY KICKS OFF IN-PERSON MEETINGS



CEO Shawn Duhamel with Berkshire Cty District 1 Hwy Superintendents Assoc Pres. Justin Russell

In June, *Mass Retirees* participated in the first in-person meeting since March of 2020.

At the invitation of the Berkshire County District 1 Highway Superintendents Association, *Mass Retirees* CEO Shawn Duhamel attended the group's first post-COVID-19 meeting on June 24th in Hindsdale, MA. The meeting of roughly 50 active public workers from across Berkshire County took place under the outdoor pavilion at the Hindsdale Volunteer Fire Department.

Like a growing number of active public workers across the country, the members of the Highway

## *Active Workers Increasingly Interested in WEP Reform*

Superintendents Association have increasingly been aware of and concerned about the Social Security Windfall Elimination Provision (WEP).

"First off, I want to thank Association President Justin Russell and Secretary Jerry Coppola for the invitation. It was wonderful to be able to safely interact with people

in-person again and the setting in Hindsdale was a perfect spot," said Duhamel. "We are witnessing an increased interest in the WEP law from active employees. Nearly everyone present at the Berkshire meeting will one day be harmed by the WEP in their retirement. It is in everyone's best interest to pass a reform law through Congress.

"One of the major difference makers this Congressional session is the level of interest and support coming from active employees. The fight for WEP reform is no longer being waged just by retirees."

## WEP Reform

CONTINUED FROM PAGE 4 ►

clause contained within H.R. 2337.

Under the current proposal, future retirees would see their Social Security benefit calculated under both the current WEP formula AND the new formula, then receive the greater of the two benefits.

Republicans, following the lead of Congressman Kevin Brady (R-TX), appear to prefer the hold harmless

clause be sunset or ended at some point in the future. Brady's proposal in 2019 would have ended the current WEP formula after forty years, after which time the new Social Security benefit would apply to all future retirees. Brady recently announced his retirement from Congress at the end of the current session in January 2023.

"We have never viewed WEP as a partisan issue and believe that there is not all that much difference between the current Democrat

and Republican positions. Mr. Neal and Mr. Brady have worked closely together on WEP and other issues of mutual concern in the past. We believe that same dynamic exists now and are doing all we can to encourage a unified front in passing WEP reform this Congressional session," continued Duhamel.

Congress is now in summer recess and is scheduled to return to formal business shortly after Labor Day in early September.

# COMMONWEALTH'S 104 RETIREMENT SYSTEMS & PRIM

## INVESTMENT RETURNS & FUNDED RATIOS

Since the 2007 enactment of Chapter 68, PERAC (Public Employee Retirement Administration Commission) has issued an annual Investment Report that summarizes the current investment return and annualized past returns of all 104 retirement systems and the state PRIM (Pension

Reserves Investment Management) Board. It also contains the funded ratios of the 104 systems based upon their most recent valuation.

"We'd like to thank PERAC for publishing its 2020 Investment Report that as always, contains very pertinent information in such a clear and concise format," says President

Frank Valeri. "Our members will not only be able to see how their system is performing, but also more fully understand the basis for our message throughout this edition of *The Voice* that retirees deserve their fair share."

The following report also contains the COLA Base.

BOARD NAME - PRNT	2020	5YR 2020	10YR 2020	36YR 2020	FUNDED RATIO	COLA BASE
Adams	8.00%	8.28%	6.46%	7.77%	67.4%	\$14,000
Amesbury	12.39%	10.34%	8.89%	8.25%	57.2%	\$12,000
Andover	12.42%	10.40%	8.99%	8.58%	47.3%	\$12,000
Arlington	11.94%	9.91%	8.72%	8.54%	54.6%	\$15,000
Attleboro	16.51%	11.65%	9.78%	9.25%	62.2%	\$13,000
Barnstable County	12.71%	10.56%	9.08%	7.83%	60.8%	\$18,000
Belmont	11.30%	9.55%	8.75%	9.38%	60.4%	\$13,000
Berkshire County	12.39%	10.35%	8.92%	9.14%	83.8%	\$14,000
Beverly	12.60%	10.44%	9.06%	8.77%	61.0%	\$12,000
Blue Hills Regional Vocational School	12.26%	10.27%	8.90%	8.84%	73.8%	\$18,000
Boston (City)	12.36%	9.62%	8.00%	8.93%	75.6%	\$14,000
Boston (Teachers)	12.23%	10.31%	8.89%	NA	41.1%	\$14,000
Braintree	13.91%	10.35%	8.29%	8.80%	67.7%	\$12,000
Bristol County	12.21%	9.99%	8.68%	8.99%	60.1%	\$18,000
Brockton	9.87%	8.90%	7.32%	8.65%	60.6%	\$12,000
Brookline	12.81%	9.88%	7.93%	8.77%	59.6%	\$13,000
Cambridge	12.08%	10.08%	9.05%	9.35%	85.8%	\$16,000
Chelsea	12.53%	10.43%	8.97%	8.22%	69.6%	\$12,000
Chicopee	12.91%	10.36%	9.19%	8.81%	79.9%	\$15,000
Clinton	12.80%	10.44%	8.90%	8.01%	67.7%	\$14,000
Concord	10.23%	9.20%	8.68%	8.65%	88.6%	\$14,000
Danvers	12.16%	9.80%	7.52%	8.15%	60.3%	\$13,000
Dedham	12.71%	10.51%	9.05%	9.62%	83.1%	\$15,000
Dukes County	12.77%	11.59%	10.24%	8.29%	78.2%	\$14,000
Easthampton	12.47%	10.38%	8.96%	8.49%	74.9%	\$14,000

CONTINUED ON PAGE 10 ►

# COMMONWEALTH'S 104 RETIREMENT PLANS

## INVESTMENT RETURNS

CONTINUED FROM PAGE 9 ►

BOARD NAME - PRNT	2020	5YR 2020	10YR 2020	36YR 2020	FUNDED RATIO	COLA BASE
Essex Regional	12.17%	10.18%	9.01%	8.90%	53.8%	\$14,000
Everett	12.68%	10.54%	9.07%	8.67%	62.9%	\$14,000
Fairhaven	12.54%	10.38%	8.98%	9.41%	74.5%	\$14,000
Fall River	12.61%	10.10%	8.82%	8.55%	41.8%	\$12,000
Falmouth	10.36%	9.30%	8.73%	8.99%	67.1%	\$14,000
Fitchburg	12.27%	10.34%	8.83%	7.92%	47.6%	\$12,000
Framingham	12.39%	10.34%	8.94%	9.38%	72.8%	\$12,000
Franklin Regional	12.65%	10.14%	9.31%	8.59%	74.4%	\$17,000
Gardner	12.37%	10.37%	8.95%	9.49%	59.7%	\$13,000
Gloucester	12.69%	10.48%	9.02%	9.03%	49.1%	\$14,000
Greater Lawrence Sanitary District	18.28%	12.35%	9.80%	8.13%	87.6%	\$15,000
Greenfield	12.88%	10.53%	9.13%	8.71%	59.9%	\$14,000
Hampden County	12.24%	10.14%	8.85%	8.76%	48.7%	\$18,000
Hampshire County	12.19%	10.12%	8.29%	8.45%	62.4%	\$13,000
Haverhill	14.45%	10.50%	8.70%	9.97%	53.0%	\$13,000
Hingham	12.59%	10.62%	8.44%	9.23%	70.4%	\$14,000
Holyoke	16.42%	11.25%	10.23%	9.63%	69.0%	\$14,000
Hull	12.43%	10.42%	8.97%	8.18%	69.6%	\$13,000
Lawrence	12.45%	10.40%	8.95%	8.07%	55.4%	\$12,000
Leominster	12.63%	10.37%	9.31%	8.76%	100.9%	\$12,000
Lexington	13.86%	10.90%	8.30%	9.00%	80.4%	\$14,000
Lowell	12.13%	10.08%	8.74%	9.18%	58.2%	\$17,000
Lynn	12.11%	10.09%	9.01%	8.24%	52.7%	\$15,000
Malden	18.02%	10.59%	9.43%	9.82%	72.9%	\$16,000
Marblehead	12.43%	10.41%	8.98%	9.34%	62.3%	\$12,000
Marlborough	14.98%	9.77%	8.11%	8.51%	75.0%	\$12,000
MHFA (MA Housing Finance Agency)	14.02%	10.73%	8.12%	7.76%	94.8%	\$15,000
Massport	16.78%	11.21%	9.08%	9.24%	90.2%	\$14,000
MWRA (MA Water Resources Authority)	13.42%	9.55%	8.48%	8.33%	88.2%	\$15,000
Maynard	13.87%	9.76%	8.89%	8.12%	72.2%	\$15,000
Medford	12.18%	8.61%	7.40%	8.77%	61.3%	\$16,000
Melrose	11.82%	9.87%	8.54%	8.53%	58.3%	\$12,000
Methuen	12.60%	10.55%	9.38%	8.27%	56.2%	\$18,000
Middlesex County	12.26%	9.95%	8.72%	8.56%	48.1%	\$16,000
Milford	12.20%	10.31%	8.85%	8.43%	61.3%	\$13,000

# RETIREMENT SYSTEMS & PRIM

## & FUNDED RATIOS

BOARD NAME - PRNT	2020	5YR 2020	10YR 2020	36YR 2020	FUNDED RATIO	COLA BASE
Milton	12.46%	10.38%	8.97%	9.47%	82.6%	\$15,000
Minuteman Regional School District	12.33%	10.13%	8.71%	9.52%	86.0%	\$13,000
Montague	12.49%	10.36%	8.95%	9.25%	78.1%	\$18,000
Natick	14.74%	10.87%	9.54%	8.41%	63.9%	\$13,000
Needham	12.48%	10.33%	8.88%	9.70%	65.6%	\$14,000
New Bedford	14.40%	11.32%	9.08%	8.40%	46.9%	\$12,000
Newburyport	12.71%	10.24%	8.86%	8.43%	64.9%	\$12,000
Newton	11.98%	10.23%	8.89%	8.78%	54.9%	\$12,000
Norfolk County	11.23%	9.57%	8.34%	8.67%	63.5%	\$18,000
North Adams	18.62%	10.97%	9.95%	9.80%	83.3%	\$13,000
North Attleboro	14.82%	10.99%	9.86%	8.93%	73.2%	\$14,000
Northampton	18.39%	10.80%	9.84%	9.63%	69.2%	\$13,000
Northbridge	12.75%	10.53%	9.06%	9.46%	71.9%	\$14,000
Norwood	15.29%	11.75%	9.27%	9.36%	78.4%	\$14,000
Peabody	12.56%	10.42%	9.00%	8.81%	49.3%	\$15,000
Pittsfield	12.04%	10.02%	8.86%	8.38%	49.3%	\$14,000
Plymouth	10.07%	9.96%	9.19%	8.93%	51.9%	\$14,000
Plymouth County	14.62%	9.83%	8.42%	9.16%	61.0%	\$16,000
PRIM	12.61%	10.42%	8.97%	9.62%	NA	NA
Quincy	Data not available at press time				45.0%	\$15,000
Reading	12.44%	10.28%	8.95%	9.36%	75.0%	\$14,000
Revere	12.36%	10.31%	8.86%	8.57%	63.5%	\$13,000
Salem Contributory	12.41%	10.29%	8.73%	8.34%	59.2%	\$12,000
Saugus	12.89%	10.47%	9.02%	9.34%	77.4%	\$14,000
Shrewsbury Contributory	12.74%	10.83%	9.59%	9.31%	93.4%	\$12,000
Somerville	27.59%	13.77%	11.31%	9.60%	62.7%	\$14,000
Southbridge	12.46%	10.41%	8.83%	8.28%	62.9%	\$12,000
Springfield	12.70%	10.61%	9.16%	8.62%	28.9%	\$13,000
State	12.69%	10.50%	9.05%	9.55%	63.7%	\$13,000
WTR (Mass. Teachers)	12.78%	10.48%	9.04%	9.56%	51.7%	\$13,000
Stoneham	7.85%	9.36%	8.46%	8.82%	78.1%	\$13,000
Swampscott Contributory	12.68%	10.25%	9.13%	9.20%	59.6%	\$14,000
Taunton	11.60%	10.08%	9.02%	9.66%	74.5%	\$15,000
Wakefield	12.50%	10.42%	9.03%	9.73%	64.7%	\$14,000
Waltham	14.05%	10.29%	9.26%	8.85%	56.8%	\$14,000

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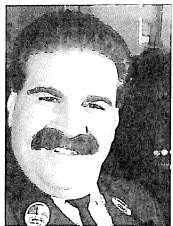
# RETIREMENT BOARDS

## ELECTIONS & APPOINTMENTS

### REMEMBERING JIMMY CUTICCHIA

#### ANDOVER RETIREE WAS FIERCE ADVOCATE

July 4th brought the sad news of the passing of retired Andover Fire Lt. **James (Jimmy) Cuticchia** following a long and valiant battle with occupational cancer.



JAMES CUTICCHIA  
ANDOVER

A life-long resident of Andover and dedicated *Mass Retirees* member since his retirement in 2014, Jimmy was an elected member and former chairman of the **Andover Retirement Board**. Jimmy was instrumental in fighting for the rights of public employees and retirees alike. This is especially true when advocating for COLAs or defending Andover retirees from unfair cuts in health insurance benefits.

After entering public service as a dispatcher in 1980, Jimmy was appointed to the Andover Fire Department in 1984 and promoted to lieutenant a decade later. He would also serve as President of Local 1658 and Vice President of Professional

Firefighters of Massachusetts (PFFM) District 4.

"Unfortunately, we lost an immensely fierce advocate for his fellow retirees. Jimmy always did his homework and was well versed in both the retirement and municipal health insurance laws," recalls Association General Counsel Bill Rehrey. "We worked closely with Jimmy and his fellow Andover retirees when the town unjustly increased premium contribution rates. The case went all the way to the Supreme Judicial Court, where the retirees' won! The victory was largely due to Jimmy not giving up on what he knew to be the right thing to do.

"It goes without saying, but Jimmy Cuticchia will be greatly missed."

In recent years, Jimmy focused his attention on increasing Andover's COLA benefits. He felt strongly that the investment success of the retirement system should be shared with the system's beneficiaries – a sentiment shared by *Mass Retirees*.



ERIC TEICHERT  
ANDOVER

**Andover** – The **Andover Retirement Board** declared Firefighter **Eric Teichert** elected to fill the vacancy of long-time elected member **Lieutenant Jim Cuticchia**. Eric was the only candidate for the vacancy and was

declared the winner by the Board. The other members declaring the election were, **Thomas Hartwell, Haley Green\*, Blackwell Taylor and Elena Kothman**, who also serves as the Board's executive director.

**Easthampton** – **Easthampton Retirement Board** members reappointed retired Lieutenant from the Springfield Fire Dept., **Cornelius Sullivan** as their fifth member.

The other members making the reappointment include **Jennifer Gallant**, retired Fire Captain **James Dunham\***, **Heta Patel**, retired Police Captain **Donald Emerson**. The Retirement Administrator for Easthampton is **Kymme Wood**.

**Greenfield** – Retired firefighter **Bill Devino\*** had no opposition in being elected to his 12th three-year term on the **Greenfield Retirement Board**. Other Board members certifying the election results include **Angelica Desroches, Kyle Phelps, Marianne Fisk** and **Frances Stotz**. **Shari Hildreth** is the administrator.

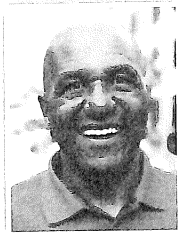
**Hampden County** – Hampden County Advisory Council appointed Wilbraham Treasurer, **Tom Sullivan** as their representative on the **Hampden County Retirement Board**. He will replace **Laurel Placzek**, who retired from the Agawam Treasurer/Collector's position earlier this year. The other members on the Board include, retired Agawam firefighter, **Karl Schmaelzle**, who also serves as the **Mass Retirees Western Mass. District Vice President**, retired Palmer Town Clerk, **Patricia Donovan, Patrick O'Neil** and retired Agawam Town Clerk, **Richard Theroux\***. **Julianne Bartley** serves as the Board's Executive Director.

**Hingham** – Hingham Board of Selectmen reappointed **Eileen McCracken** as their representative and the **Hingham Retirement Board** reappointed **Charles Cristello** as their fifth member. The other Board members include **Susan Nickerson\***, Deputy Police Chief, **David Jones** and **Jean Montgomery**. Hingham's Retirement Board Administrator is

CONTINUED ON PAGE 13 ►

**Aksana Holmes.**

**Lawrence** – The **Lawrence Retirement Board** members voted to appoint **Sheryl Wright** as the Board's 5th member. Their former 5th member, retired Lawrence teacher, **Bill Bateman**, passed away suddenly on June 15th. **Sheryl Wright** is a retired Northampton City Auditor. The Board members making the appointment include **Ramona Ceballos, Thomas Cuddy, Kevin Loughlin** and former Retirement Board Deputy Director, **Gina Rizzo**. The Board's executive director is **Diane Cockroft**.



**BUZZY BARTON**  
LYNN

**Lynn** – Retired firefighter "**Buzzy**" **Barton** was unopposed in his 7th reelection bid to the **Lynn Retirement Board**. Barton, a former outstanding High School Basketball coach and player, is also

up for reelection this fall to the Lynn City Councilor at Large position that he has held for a number of years. The other elected member is retired firefighter **Rich Biagiotti CFA**, who serves with **Stephen 88 Spencer**, and **Michael Marks, Esq.\*** and Association President **Frank Valeri**. The executive director is Lynn native **Gary Brenner**.

**Mass Housing** – **Antonio Torres** was declared elected by the **Mass.**



**LISA SERAFIN**  
MASS HOUSING

**Housing Finance Agency (MHFA) Retirement Board**, as he ran unopposed for his sixth term. Also, Board members welcomed **Lisa Serafin\*** as the new Ex-Officio member

and Chairwoman of the **Mass. Housing Retirement Board**. Lisa Serafin was elected Treasurer, a role previously held by **Andris Silins**. Ms. Serafin, who joined the Mass. Housing Board in 2016, is a Principal with Redgate Real Estate Advisors. Mr. Silins will be retiring after serving twenty-four years with the Board. Also serving on the Board are retired MHFA employee **Mike Fitzmaurice**,

**Pin Yin Chai** and **Paul Hynes, Esq.** The Board's executive secretary is **Joseph Petty**, who also serves as the Mayor for the City of Worcester.

**MWRA** – **Jim Fleming\* Esq.** was declared elected, without opposition to the Mass Water Resources Authority by the **MWRA Retirement Board**. Jim has served as one of the two elected members since before the reorganization of the retirement board's five-member structure. The other members on the Board include **Andrew Pappastergion, Thomas Durkin, Kevin McKenna** and **Frank Zecha**, who also serves as Retirement Board Director in Brookline. The Board's Executive Director is **Carolyn Russo**.

**Natick** – The Natick Board of Selectmen reappointed **Eliot Lurier** as their appointment to the **Natick Retirement Board** for his second term. Natick's other Board members include **Arti Mehta, Nicholas Mabardy, Michael Reardon** and **Michael Melchiorri\***. The Board Director is **Kathleen Bacon**.

**Northampton** – Mayor **David**

**Narkewicz** appointed Charlene Nardi to replace Susan Wright as Finance Director, who is retiring after 17 years of service with Northampton. Ms. Nardi was the town administrator for the Town of Williamsburg and the Town of Chesterfield. The other remaining members on the Northampton Board are **Joyce Karpinski\*, Michael Lyons, Tammy Suprenant** and **Thomas Sullivan**. The Board's Retirement Administrator is **David Shipka**.

**Northbridge** – Incumbent retired police officer, **John Meagher, Jr\*** was reelected to a new three-year term on the **Northbridge Retirement Board**. Meagher, was unopposed and declared the winner by the Board and will begin his ninth term. Also serving on the Board are trustees **Neil Vaidya, Sharon Susienka**, retired School Director of Operations **George Murray** and **Thomas Frieswyk**. **Scott McGrath** is the Northbridge Retirement Board Administrator.

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# PRIM'S CLIENT SERVICES OFFICE

## DANIELE SUCCEEDS TODISCO

At the PRIM (Pension Reserves Investment Management) Board, **Francesco Daniele** has succeeded **Paul Todisco** as its Director of Client Services. Recently we reported on Todisco's retirement after decades of public service (see *May Voice*). Having begun his professional career in the private sector, Daniele joined PRIM in 2016, working with Todisco in the Client Services Office.

**FRANCESCO DANIELE**  
PRIM  
DIR. OF CLIENT SERVICES

Among its many functions, PRIM manages and invests all or a portion of the pension funds for almost

all of the state's 102 local retirement systems. As Client Services Director, Francesco's responsibilities include managing client relationships with the local retirement systems and also working closely with the PRIM Advisory Council and the SRBTF (State Retiree Benefits Trust Fund) Board that is the focus of our article on page 14.

According to Association Executive Vice President Paul Shanley, "As one of two elected PRIM Board members, I've had numerous opportunities to observe Francesco in action over the past few years. I'm fully confident that he will do an outstanding job and do his predecessor Paul proud."

# STATE OPEB FUND CONTINUES GROWTH

## *Almost \$2.5 Billion in Assets*

**O**PEB is an acronym that our members know well, having heard it from us for more than a decade and a half. OPEB refers to Other Post-Employment Benefits, which consists almost entirely of future retiree health care costs.

### **SRBT HISTORY**

Briefly, we saw the issue of future retiree health care costs assume even greater prominence in 2004. That's when a private sector board, called GASB (Government Accounting Standards Board), finalized a new accounting Rule 45 for state and local governments, entitled Other Post-Employment Benefits or OPEB. It required them to disclose on their financial papers the future costs of post-employment benefits, including retiree health care costs.

And the new OPEB Rule extended beyond the reporting of these costs. State and local officials were also expected to show how they intended to pay it off.

It was three years later (2007) that the State Retiree Benefits Trust (SRBT) was created as Section 24 of the state group insurance law (Chapter 32A), to "solely meet liabilities of the state employees' retirement system for healthcare and other non-pension benefits for retired members of the system."

In other words, the SRBT became and remains the Commonwealth's OPEB trust whose funds are invested by the state PRIM (Pension Reserves Investment Management) Board. And SRBT's scope expanded four years later – in 2011.

That's when the state OPEB law

was amended, allowing local governments to transfer their OPEB funds into the SRBT. It should be noted that prior to the 2011 change in the law, local governments had created their own OPEB trusts. They did so either with special legislation or adopting the local option law, sponsored by *Mass Retirees* and enacted in 2008 that allows local governments to establish their own OPEB trust.

### **LOCAL PARTICIPATION INCREASING**

"Since we reported on the Town of Hingham being the first to participate in SRBT, the number of local participants has significantly grown," according to *Voice* Publisher Nancy Delaney. "In 2019, there were 69, up from the 56 participants two years earlier.

"And now – another two years later – 76 cities, towns districts and authorities have transferred their OPEB funds to the SRBT." At the end of last year, the Town of Bellingham's request to join was approved, while just this year the City of Worcester and the Town of East Bridgewater became the latest participants.

"Since the PRIM Board invests the SRBT funds, its Client Services Office, directed by Francesco Daniele (see related article, p. 13) has the added role of outreach to local governments and retirement boards, educating them about SRBT, as well as PRIM and explaining how it invests their OPEB funds," comments Association official Nancy McGovern. "And as the numbers show, they have been succeeding in that role, even during the pandemic with Bellingham, East Bridgewater

and Worcester recently joining the ranks."

### **ASSET VALUE: MORE THAN DOUBLED IN 5 YEARS**

McGovern continued, "When we reported on the value of the SRBT assets five years ago (May 2016 *Voice*), we highlighted that it was approaching \$1 Billion – in fact, at \$939 Million. Well not only was the \$1 Billion milestone reached over the past 5 years, but the asset value has increased an outstanding 150% to \$2.48 Billion."

Of the \$2.48 Billion, approximately \$771 Million are assets of the local participants. That represents a little over 30% of the SRBT assets being invested by PRIM.

McGovern concludes, "It's interesting to note that five years ago, local participation accounted for about \$198 Million in SRBT assets. Today's assets are almost three times that amount. That's amazing, and we shouldn't be surprised to see

**CONTINUED ON PAGE 15 ►**

## **SRBT ►** *Participants*

Here is a listing of cities, towns, districts and authorities that have opted to transfer their OPEB Funds to the SRBT than create and maintain their own trust fund. See related article on local OPEB trusts on p. 15.

## ....and some have their own OPEB trusts

While several communities have deposited their OPEB Funds with the SRBT, there are others that made the decision to manage and invest locally. And like the state, they've been successful at it.

By way of background, communities were creating trusts for future retiree healthcare costs even before GASB finalized its Rule 45 (OPEB) in

2004. Among them were the towns of Arlington, Bedford, Brookline, Hingham, Lexington, Needham, Quincy, Waltham, Wellesley and Winchester.

According to Legislative Liaison Nancy McGovern, "Each of these communities was successful in having special legislation enacted that authorized them to establish OPEB

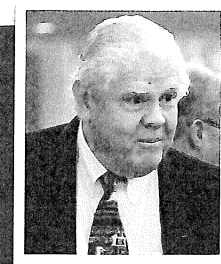
trusts for future healthcare costs."

"It's noteworthy that after the law was changed in 2011, allowing communities to transfer their OPEB funds to the SRBT, some of those listed above did so including Bedford, Brookline, Hingham, Needham and Wellesley. But not all have adopted the 2011 option."

### SPOTLIGHT ON PLYMOUTH

"In fact, other communities have enacted special legislation to create their own OPEB Trust," continued McGovern. "That includes the Town of Plymouth." *Ed Note: As reported*

*earlier, Association sponsored legislation was enacted in 2008 (Chapter 479) allowing the creation of local OPEB Trusts, as an*



TOM KELLEY  
(CHAIRMAN - PLYMOUTH  
RETIREMENT BOARD)

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#### Towns

Acton	Burlington	Holliston	Milton	Stockbridge
Amherst	Chelmsford	Ipswich	Montague	Tewksbury
Ayer	Cohasset	Lancaster	Needham	Wakefield
Bedford	Dalton	Lenox	North Andover	Wayland
Bellingham	Dedham	Lincoln	Northborough	Wellesley
Blackstone	Dracut	Longmeadow	Northfield	Westwood
Boxford	East Bridgewater	Manchester-By-The-Sea	Orleans	Wilmington
Braintree	Franklin	Marblehead	Provincetown	
Brewster	Harvard	Medfield	Reading	
Brookline	Hingham	Middleton	Sherborn	

#### Cities

Beverly	Fitchburg	Leominster	New Bedford	Newburyport
Newton	Worcester			

#### Regional School Districts

- BiCounty Educational Collaborative, Franklin, MA
- Concord Area Special Education (CASE) Collaborative
- Greater Lowell Regional Technical School
- Lincoln-Sudbury Regional School District
- Lower Pioneer Valley Educational Collaborative
- Manchester Essex Regional School District
- Nashoba Regional School District
- Old Rochester Regional School District
- Shawsheen Valley Technical High School, Billerica, MA

#### Districts & Authorities

- Boston Redevelopment Authority
- Byfield Water District
- Fall River Housing Authority
- Franklin Regional Council of Governments
- Lawrence Housing Authority
- Lowell Regional Transit Authority (LRTA)
- Marblehead Municipal Light Department
- Massachusetts School Building Authority
- Mass Water Resources Authority
- Pilgrim Area Collaborative (PAC), Pembroke, MA
- Quabbin Health District
- South Hadley Fire District
- Wakefield Municipal Gas & Light Department

# Retirement Systems

CONTINUED FROM PAGE 10 ►

BOARD NAME - PRNT	2020	5YR 2020	10YR 2020	36YR 2020	FUNDED RATIO	COLA BASE
Watertown	13.42%	10.09%	8.76%	8.51%	91.7%	\$14,000
Webster	9.61%	9.21%	8.46%	8.23%	58.4%	\$16,000
Wellesley	12.51%	10.42%	9.01%	9.99%	77.7%	\$18,000
West Springfield	18.19%	10.55%	9.71%	8.53%	66.4%	\$13,000
Westfield	15.26%	10.65%	9.96%	9.03%	73.5%	\$13,000
Weymouth	15.65%	10.35%	8.89%	9.89%	65.6%	\$12,000
Winchester	12.60%	9.70%	7.98%	9.06%	80.5%	\$14,000
Winthrop	12.60%	10.44%	8.83%	8.83%	83.2%	\$12,000
Woburn	12.58%	10.47%	9.08%	9.45%	61.1%	\$14,000
Worcester	11.87%	10.03%	8.03%	8.89%	63.9%	\$13,000
Worcester Regional	12.53%	10.28%	8.82%	8.39%	46.4%	\$16,000
COMPOSITE	12.80%	10.38%	8.93%	9.31%	NA	NA

## State Budget

CONTINUED FROM PAGE 5 ►

must be noted that the language only changes the hours limitation. The earnings restriction still remains the difference between a retiree's pension and the current salary of the job from which they retired, plus after the first year of

retirement, an additional \$15,000. The earnings restriction was last changed in 2014, and there are no plans to make changes to this portion of the law in this proposal. However, the Governor sent back new language to legislature to increase the hours from 960 to only 975 hours per calendar year.

While the Governor sent back new

language to increase the hours from 960 to only 975 hours per calendar year, the Legislature has taken the initial steps to restore the original language as we've requested. Since there are additional steps in the process, please look to our Hotline, website, video emails and other media outlets for updates.

## Elections

CONTINUED FROM PAGE 13 ►

**Peabody - Richard Yagjian\*** was reappointed by the **Peabody Retirement Board** members as the 5th Member of the Board for his ninth term. The other members serving on the Board are **Michael Gingrich**, **Edward Lomasney**, retired Fire Lieutenant and *Mass Retirees Northern Area V.P.*, **Joseph DiFranco, Sr.** and **Linda Cavallon**. The Peabody Retirement Board's Pension Administrator is **James Freeman**.



JOHN HALSEY  
READING

**Reading - Reading Retirement Board** members appointed a new fifth member, **John Halsey**, retired Ex. VP, Chief of Operations Officer at the Colony

Group, LLC Boston. He has replaced **Thomas Clough** as the Board's fifth member. The members making the appointment were **Sharon Angstrom**, **Carol Roberts**, firefighter **David Gentile\*** and retired custodian **Joseph Coughlin**. The Board Administrator is **Colleen Loughlin**.

**Springfield - Retired Police Officer, Thomas Scanlon\*** was overwhelmingly reelected to the **Springfield Retirement Board** by receiving 823 votes and his challenger, DPW Engineer, **Vladimir Caceres** receiving 176 votes. It will be Mr. Scanlon's fourth term on the Board. The other members on the Board include **Patrick Burns**, **Haskell Kennedy, Jr.**, **Philip Manton** and retired Police Lieutenant **Robert Moynihan**, elected Treasurer of the **Mass. Association of Contributory Retirement Systems (MACRS)**. The Executive Director for the Springfield system is **Susana Baltazar**.

**Webster - The Webster**

**Retirement Board** appointed a new fifth member, **Brian Perry**, who is



BRIAN PERRY  
WEBSTER

a retired investment banker from the Webster Five Cent Savings Bank to replace **Daniel Bonnette**. The other members on the Board making the appointment were **Robert Craver\***, **Timothy Bell**, **Eleanor Doros** and **James Hoover**. The Board Administrator is **Kristin LaPlante**.

**Wellesley - Wellesley Retirement Board** members reappointed **Charles Cahill** as their 5th member for his fourth term on the Board. Other Board members include **Sheryl Strother**, **David Kornwitz\***, **Michael Leach** and **Timothy Barros**. The Board's Administrator is **Lynn Whynot**.

\*Denotes Chair

# MORE ABOUT CHAPTER 69 AND THE PECs THAT IT CREATED

As you've read in the July *Voice*, the Association's role, involving local health insurance, took on even greater significance with the passage of Chapter 69, the 2011 Municipal Insurance Law. If a community implemented the law and created a PEC (Public Employee Committee), then *Mass Retirees* appointed the retiree designee on that committee.

We anticipated that a number of communities would be implementing the law and so they have, which means our PEC appointments have also expanded. It's important to note that while several communities adopted Chapter 69, they did not proceed any further in the process.

They did not implement the law by creating a PEC and entering into an agreement with it. So what we've listed at the right, are those communities that took the next step forward with a PEC on which we've designated the retiree representative.

Andover	Holden
Arlington	Holliston
Bedford	Hyannis
Bellingham	Lee
Belmont	Lenox
Billerica	Middleton
Concord	Methuen
Chelmsford	New Bedford
Danvers	Northampton
Dedham	North Andover
Everett	Plymouth
Fairhaven	Reading
Fall River	Salem
Framingham	Scituate
Great Barrington	Sharon
Hadley	Westfield
Halifax	Winchester
Haverhill	

## President

CONTINUED FROM PAGE 3 ►

cannot keep pace with inflation. Basic Medicare premiums alone have increased \$48 a month since 2013. As we explain within the article on page 6 & 7, growth of the COLA benefit has been curtailed due to the restraints imposed by rigid pension funding schedules.

However, the time has come to share the amazing historical investment success with retirees, for whom the retirement system exists to serve. *Mass Retirees* believes that this shared success should take the form of improved and expanded COLA benefits for retirees.

Our Association proposes a two-step approach for COLA improvements. First, the traditional COLA base to which the annual benefit is applied should continue to be

incrementally improved on an ongoing basis.

Second, we have proposed the creation of an additional Enhanced COLA benefit designed to help long-term public retirees catch up with inflation. This enhanced or "Senior" COLA benefit would kick in beginning after 15 years of retirement for retirees who had at least 20-years of public service prior to retirement.

If history is a guide, it is safe to assume that we will soon witness some municipal and state officials proposing that excess pension fund earnings be used to reduce the government's appropriation to the retirement system. A reduction in government funding should only take place in coordination with retiree benefit enhancements.

By not participating in Social Security, Massachusetts state and local governments do not pay the mandatory 6.2% federal payroll tax – a savings of more than \$700

million per year! Successful pension investment practices, which are largely funded by public employees' contributions, should not result in the government using excess gains as the means to supplement the employer's responsibility to fund the system.

Operating outside of Social Security should not absolve the employer of the responsibility to contribute its share toward an employee's retirement nor of the need to provide a meaningful COLA benefit. Now is the time for these issues to be addressed.

In the past year alone, the state's PRIT Fund has grown by \$20.7 billion. Local retirement systems, many of which invest within PRIT, have done just as well. These historic gains, along with the success of the past 36 years, must be shared with the beneficiaries for whom these funds exist.

## CAUTIOUS APPROACH WITH DIVESTMENT

### *Several Legislative Proposals Filed*

A topic that was raised during our June Town Hall Meeting was regarding the issue of pension fund divestment.

During the question-and-answer segment with Pension Reserves Investment Management (PRIM) Board Executive Director / Chief Investment Officer Michael Trotsky, the importance of keeping politics out of the operation of our public pension systems was briefly discussed. This applies to both the operation of the board itself, as well as the system's investment practices.

A growing trend here in Massachusetts, as well as throughout the country, is to encourage public pension systems, as well as both public and private endowments, to divest of certain investment holdings from the system's portfolio. For instance, recently there has been a lot of focus on the divestment of stocks or investments involving fossil fuels.

Those advocating for divestment of fossil fuel investments not only

cite environmental concerns, but also economic as large segments of the global economy shift toward renewable energy sources. This concept

has gained popularity across a wide spectrum of global investors, including Saudi Arabia's own Public Investment Fund (PIF) – which has taken a very public stance on diversifying the oil-rich kingdom's sovereign wealth fund.

In addition to bills requiring public pension fund divestment from certain types of fossil fuel investments, additional legislation now pending on Beacon Hill targets other types of investments for divestment based on political or moral grounds.

Examples include bills requiring divestment from Raytheon, due to the company's production and sale of military equipment to Saudi Arabia, as well as bills divesting from companies producing ammunition and firearms, nuclear weapons or doing business in Myanmar (Burma).

While the application of divestment dates back several decades and is credited with helping to end Apartheid in South Africa, as well as the political violence that once gripped Northern Ireland, its appeal has spread in recent years as a tool of

various political activists focused on a variety of causes.

"Over the many decades that various divestment plans have been proposed, the position taken by *Mass Retirees* has been one of caution. Our Association did support divestment from South Africa, as well as from certain companies involved in Northern Ireland and those doing business with Iran. In each case, divestment served to reinforce US foreign policy," recalls Association CEO Shawn Duhamel. "However, these are select cases that fit within official policy views. In general, we must take a very cautious approach when it comes to any policy that could negatively impact our pension systems. Our members rely on these funds in their retirement.

"In our view, investment decisions are best left to qualified professionals and made without political interference. Public pension systems should not be singled out or used to support a political agenda or ideological point of view. Heading down that road, regardless of the merits, is a very dangerous and slippery slope that can only lead to investment returns being placed at risk.

"At the end of the day, if our public retirement systems suffer then our members suffer. Looking out for the best interest of our members is our sole focus."

## WAIVER EXTENSION UPDATE

In the days leading up to the June 15th expiration of the Governor's state of emergency related to the COVID-19 pandemic, the House and Senate swiftly acted on legislation that would extend some policy measures related to the pandemic. The Senate acted on their version of the legislation on June 11th. Senator Michael Brady (D-Brockton) was able to secure an amendment that would extend the Special Post Retirement Work waiver until December 15, 2021. The House completed a version of the legislation on June 15th, the day the state of emergency expired and

### *Restrictions In Effect*

did not include language to extend the waiver. In an unusual move, the House and Senate named a conference committee the same day to work out the differences in the versions and send a final document to the Governor.

When the conference committee report emerged late in the evening of June 15th it was only a partial report that pertained to items included in both versions. All the other items

were left in the conference committee, including the language pertaining to the extension of the special waiver. We have continued to work with our legislative allies to advocate for the extension.

The expiration of the state of emergency on June 15th means that the restriction of 960 hours and earnings restriction of the difference between a retiree's public pension benefit and the annual salary their former job currently pays, plus an additional \$15,000, will be in effect from June 15, 2021, until December 31, 2021.

# Plymouth

CONTINUED FROM PAGE 15 ►

*alternative to special legislation.*

"Plymouth has always exhibited a strong spirit of independence and work ethic when it comes to its pension fund and health insurance programs," according to Association CEO Shawn Duhamel, who was raised there and served on its retirement board. "Yes, we have," adds Plymouth Retirement Board Chairman Tom Kelley, retired police officer and a longstanding Association member.

"We manage and invest our pension funds and don't participate in the state PRIT (Pension Reserves Investment Trust). And

we've averaged almost double-digit investment returns over the past five years, including 10.07% in 2020.

"So, when we created our OPEB Trust back in 2013, we didn't adopt the state local option (Chapter 479) since it didn't allow local retirement boards to manage and invest OPEB funds. We successfully enacted a special law, Chapter 113, that has our retirement board in charge of the town's OPEB Trust." **Ed Note:** *As reported earlier, Chapter 218, enacted in 2018 – some 5 years after Plymouth's special legislation – allows local retirement boards to manage and invest OPEB funds.*

Currently, the Plymouth Retirement Board is managing almost \$9 Million in the Trust. Kelley continues, "The Board has the same

money manager for OPEB that we have for our pension funds. As we see it, Rhumblin has performed exceptionally well, producing excellent returns for us on both accounts.

"Also, the town has stepped up and continued to make appropriations to the Trust. We're looking at some \$1 Million this year."

Duhamel offers the following observations. "It's a very positive sign to see that communities, districts and authorities are attempting to address future retiree healthcare costs, either with the SRBT or their own trust fund. Their efforts have continued despite the recent challenges from the pandemic. Thank you."

# Leg. News

CONTINUED FROM PAGE 5 ►

the retention of coverage should a surviving spouse remarry. We spotlighted this and other legislation related to survivor benefits in the *July Voice*.

**H2708/S1676: An act further regulating group insurance benefits for state employees and retired state employees**, filed by Representative John Lawn (D-Watertown) and Senator Brendan Crighton (D-Lynn), was also heard. In order to offer a more comprehensive life insurance

benefit that appropriately reflects current funeral/burial costs, our bill raises the basic life insurance benefit for state retirees who are insured through the state's Group Insurance Commission (GIC) from \$5,000, which was set in 1985 – more than 35 years ago – to \$10,000. As a result of Association sponsored legislation, municipalities already have the option of setting higher basic life insurance benefits; therefore, no further legislation is required for the local level.

The final three pieces that we submitted testimony on are related to the Group Insurance Commission. They are **H2719: An**

**act relative to group insurance costs for certain public retirees** filed by Representative John Mahoney (D-Worcester), **H2660: An act further regulating the withdrawal of local subscribers from the commission** filed by Representative Thomas Golden (D-Lowell) and **S1713: An act relative to the composition of the Group Insurance Commission**, filed by Senator Paul Feeney (D-Foxborough).

We anticipate that the hearing schedule will pick up now that the FY 2022 budget and legislation addressing pandemic related policies have been completed.

*The following members of our Association have recently passed away.  
We extend our deepest sympathy to their families.*

ANDERSON, PAUL D. – N. Reading, MA  
(Survivor, Mass Bay Community College)  
ANDREW, MARJORIE – Cambridge, MA  
(Middlesex County Engineering Dept.)  
BAME, VERLYNE E. – Winter Haven, FL  
(Cape Cod Community College)  
BARNES, EDITH R. – Searcy, AR  
(Somerset Teacher)  
BERZON, FAYE C. – Canton, MA  
(Massasoit Community College)  
BOEN, WALLACE E. – Brockton, MA  
(S. Easton Teacher)  
BURNS, GAIL K. – Bellingham, MA  
(State Dept. of Mental Health)  
BYLINSKI, JOSEPHINE – Worcester, MA  
(Survivor, Worcester Police Dept.)  
COLANTONI, JOSEPH – Palm Bay, FL  
(State Dept. of Transportation)  
COTTER, EDWARD J. – North Weymouth, MA  
(Middlesex Court)  
DALEY, NORMA M. – Dennisport, MA  
(Brookline Library)

DENTY, MARY I. – Plymouth, MA  
(Waltham District Court)  
DEVINE, LAWRENCE J. – E. Longmeadow, MA  
(E. Longmeadow School Department)  
DINES, SALLY S. – Baldwinville, MA  
(Fitchburg Housing Authority)  
FAVAZZA, JOSEPH – Gloucester, MA  
(Gloucester)  
FOLEY, EVIN A. – Quincy, MA  
(State Higher Education)  
FRENCH, ALDEN P. – Bedford, MA  
(Bedford Police Department)  
GIARDINA, GENE – Lynn, MA  
(North Shore Community College)  
GLOVER, KENNETH – Melrose, MA  
(State Police)  
GRANATA, ANTHONY – Concord, MA  
(State)  
HEINTZ, PATRICIA E. – Otisfield, ME  
(Waltham Teacher)  
HEMEON, MARY E. – Gloucester, MA  
(Lexington School Department)

HERRICK, JOHN B. – Strafford, NH  
(Whittier Reg Voc Tech Teacher)  
HURLEY, RICHARD D. – Westwood, MA  
(Medfield Police Department)  
JOHNSON, CONSTANCE D. – Southwick, MA  
(Southwick School Department)  
KENNEY, DAVID W. – Easthampton, MA  
(State Dept. Developmental Services)  
KIDDER, BRUCE G. – Elloree, SC  
(Concord Fire Department)  
LABA, MARGARET C. – Whitinsville, MA  
(Northbridge Teacher)  
LeBLANC, LOUIS J. – Fitchburg, MA  
(Fitchburg Fire Department)  
LIKELY, A. NIKKI – Auburndale, MA  
(Survivor, Newton Police Dept.)  
McGOVERN, ROBERT E. – Jamaica Plain, MA  
(Boston Redevelopment Authority)  
McMANN, CATHIE M. – Milton, MA  
(Quincy Teacher)  
MARTIN, LILLIAN K. – Townsend, MA  
(Townsend Teacher)

*Continued on back page*





RETIRED STATE COUNTY AND MUNICIPAL EMPLOYEES  
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**THE VOICE**

September 2021



*God Bless America.*

## DECEASED MEMBERS (continued)

- |   |   |   |
|---|---|---|
| MARTIN, ROBERT J. – Taunton, MA<br>(State Trial Court)                              | POWERS, CAROLYN – Taunton, MA<br>(Taunton State Hospital)               | STRUZZIERO, ANTHONY A. – Saugus, MA<br>(Saugus School Department)     |
| MATTOS, RONALD J. – N. Ft. Myers, FL<br>(Cambridge Fire Department)                 | RATTRAY, DONALD N. – Melrose, MA<br>(Melrose Fire Department)           | SWANSON, JAMES E. – Walpole, MA<br>(Boston School Department)         |
| MEDAL, HECTOR E. – Boothbay Harbor, ME<br>(Boston Fire Department)                  | REAGAN, BARBARA A. – Salem, NH<br>(Brockton Teacher)                    | TALBOT, WILLIAM H. – Somerset, MA<br>(State Dept. of Public Safety)   |
| MEDEIROS, LUCILLE C. – S. Dartmouth, MA<br>(Survivor, Acushnet School Department)   | REBELLO, NELSON – Sharon, MA<br>(Sharon Teacher)                        | THAYER, PHILLIP P. – Hanover, MA<br>(Duxbury Police Department)       |
| MELLACE, ARTHUR – Peabody, MA<br>(Revere Teacher)                                   | REYNOLDS, SHARON A. – Barre, MA<br>(Fitchburg Teacher)                  | THIBAUT, KATHLEEN M. – Westport, MA<br>(Westport Teacher)             |
| MESPELLI, MARY A. – Framingham, MA<br>(Framingham Teacher)                          | RIVEST, ESTELLE A. – Holyoke, MA<br>(Holyoke Community College)         | THOMPSON, LOUISE R. – Loda, IL<br>(Brookline Teacher)                 |
| MOLINO, GINO A. – Reading, MA<br>(Revere Teacher)                                   | ROCHE, MARLENE J. – Holland, MA<br>(State D.S.S. – D.M.R.)              | TOOMEY, WILLIAM P. – Methuen, MA<br>(Nashoba Valley Tech Teacher)     |
| MULLALY, JAMES E. – Millville, MA<br>(Bellingham Teacher)                           | ROSELLI, ANTHONY M. – Reading, MA<br>(Milton Teacher)                   | TOSI, ANN M. – Plymouth, MA<br>(Plymouth Teacher)                     |
| MULLOY, WILLIAM E. – Weymouth, MA<br>(Boston Fire Department)                       | SAHAGIAN, AGNES B. – Holden, MA<br>(State Dept. of Social Services)     | TWOMEY, JAMES J. JR. – Jamaica Plain, MA<br>(State, House Clerk)      |
| MURPHY, JAMES F. – Milton, MA<br>(Suffolk Probate Court)                            | SANDERS, PAUL T. – Emerald Isle, NC<br>(Boston Police Department)       | WAITE, DONALD G. – Center Conway, NH<br>(Town of Middleboro)          |
| MURPHY, MICHAEL K. – Fitchburg, MA<br>(Fitchburg Fire Department)                   | SANTA MARIA, EDMUND A. – Roslindale, MA<br>(Cambridge Water Department) | WALSH, JESSIE A. – Whitman, MA<br>(Plymouth County Hospital)          |
| MURRAY, RICHARD – Thornton, NH<br>(Weymouth Police Department)                      | SANTOS, JANICE – New Bedford, MA<br>(New Bedford Teacher)               | WALSH, MARY C. – Mechanicsburg, PA<br>(New Bedford Teacher)           |
| NOVAK, DIANE T. – West Springfield, MA<br>(Southampton Teacher)                     | SATERIALE, GEORGE R. – Medford, MA<br>(State Police)                    | WARD, ROBERT M. – Quincy, MA<br>(Suffolk County Sheriff's Department) |
| O'DEA, CAROL F. – Lowell, MA<br>(State Treasury Department)                         | SERLEY, MARGARET F. – Madbury, NH<br>(Andover Teacher)                  | WESTERLUND, ROBERT I. – Brockton, MA<br>(Brockton Fire Department)    |
| O'NEIL, HENRY C. JR. – Newton, MA<br>(State Welfare Department)                     | SHAWCROSS, JOHN F. – Woburn, MA<br>(State M.W.R.A.)                     | WILCOX, ANN E. – N. Conway, NH<br>(Framingham Teacher)                |
| ORPIK, STANLEY J. – Concord, MA<br>(Concord Fire Department)                        | SHEA, JAMES F. – Westfield, MA<br>(Westfield Teacher)                   | WILK, CAMILLE J. – Fuquay, NC<br>(Survivor, State)                    |
| PAULEY, DAVID E. – Ipswich, MA<br>(Danvers Teacher)                                 | SILVA, ROGER L. – New Bedford, MA<br>(New Bedford Teacher)              | WILLIAMS, PAUL A. – Bradford, VT<br>(Northampton Teacher)             |
| PELLETIER, MICHAEL W. – Greenfield, MA<br>(State Dept. of Environmental Management) | SLATTERY, LETITIA M. – Leominster, MA<br>(State Welfare Department)     | WILSON, JEFFREY A. – Oxford, MA<br>(Oxford Fire EMS Department)       |
| PELLETIER, RONALD P. – Gardner, MA<br>(State, Dept. of Mental Retardation)          | STAPLETON, LEO D. – South Weymouth, MA<br>(Boston Fire Department)      | WOLPERT, LIBBY S. – Millis, MA<br>(Medfield State Hospital)           |
| PESA, PETER – Milton, GA<br>(State Dept. of Revenue)                                | STEELE, MARY M. – South Weymouth, MA<br>(Boston Health & Hospitals)     | WOODLEY, ROSA L. – Lauderhill, FL<br>(Boston City Hospital)           |