

## Chronology of Historical Changes

- 1943 - Dec 1 – BOS Authorized **establishment of the Fairfax County Policemen’s Pension and Retirement Board** – Police Contribution rate -12%
- 1944 - March 29 – Approved to be enacted by the General Assembly of Virginia, Police Retirement Act empowered the County to establish the “**Policemen’s Pension and Retirement Board**” – 5 members
- 1955 - **Supplemental Retirement System (SRS) established** (contributes 4% salary–1.5% multiplier)
- 1967 - Sept – School Food Service employees came into SRS
- 1968 - Sept – School Bus Drivers came in the SRS
- 1969 - July – Park Authority came in the SRS
- 1973/74 - Ordinary disability changed to 5 years for vesting
- 1974 - May 6 – **Uniformed Retirement System Established**  
 - July 1 – **Fire/Sheriff/Park Police/(Game Wardens came from SRS into URS Contribution of 4% up to SStaxwagebase & 5¾% above**  
 - July – No longer convert to regular service from ordinary disability when reaching age 65 but do start drawing on own contributions
- 1977 - April – Crossing Guards (established in 1951) came into the SRS (10/81 refunded for purchase of time given)
- 1981 - **July – Plan B established (Supplemental System) - employee contributes 5.33% with a multiplier of 2.0% (Plan A members contribute 4% (up to tax wage base, 5.33% above) multiplier of 1.8%)**  
 - **Plan B established (Uniformed) employee contributes 7.08%**  
 - SRS Choice to switch plans was advertised in Courier, June 12 & July 2 & 17, 1981 Members had 30 days from June 22 to inform Agency in writing of decision to switch. Increased contribution amount was effective with Payroll #15, payable July 31.  
 - Aug 28 Courier mentioned some Plan A to B changes might be possible in Sept if request received nlt 9/30/81 – requests were to be reviewed on case-by-case basis  
 - Uniformed had many changes this year, including addition of early retirement option, Plan B URS, added normal ret age to 25 years service in addition to age 55 with 6+ yos, and provided pro-rata credit for accrued sick leave – same as SRS.  
 - SRS Multiplier increased from 1.5 to 1.8% & increased pre-62 benefit to 1% of afc

- PORS – new auto cola of 4% annually, raise normal retirement to 25 years or age 55 for future participants, raised auto ben amounts, change in what makes eligible time for comp, vesting rights to members after 5 yrs, early benefits and changes to Colas
  - Numerous cola changes for all 3 systems
- 1985**
- July – Economic development employees came in the SRS system (new with no previous service granted)
  - Jan 1 – Contributions to retirement on active payroll were not taxed
- 1986**
- May – No pro-rating of monthly check for deceased retirees, full amount given to estate account of retirees who deceased anytime during month
  - Retirees under disability benefits before September of 1986 stay with old rules for life insurance reductions (age 65 and 70)  
After September 86-reduced first September after effective date (like regular service)
  - July 2 – Retirees from 7/2/86 – 12/31 exclusion never changes retirement from 1/1/87 exclusion changes with life expectancy
- 1987**
- Jan 1 – No age limit for joining supplemental system.  
Can buy back service; must work 5 years  
Once in the Supplemental system, can withdraw within 30 days of employment; when retiree is 59½ can choose not to join. Forms for this handled in Agency
  - April 23 – Risk Management workers compensation contact (previously LCM)
  - July – All new retirees will have unused sick leave on payroll
  - July 20 – Active employees who decease on the payroll with at least 5 years service – spouse has option to refund or have monthly benefit
  - Aug – \$30 premium reduction taken on August, 1987 payroll for those retirees 62 and over with hospitalization deductions on the payroll. If a retiree deceases and designates a spouse benefit, that spouse will be entitled to the reduction when the retiree deceases if if the spouse is then 62 or over (explanation in hospitalization folder)
    - \* \$30 subsidy to be done on payroll month of 62<sup>nd</sup> birthday at which they became 62
    - \* \$60 rebate to disability retirees for month of August & September (11/87 payroll)
  - All 3 systems - Mandatory retirement at age 70 eliminated, eliminate age 70 age limit on eligibility for svc-con dis retirement
  - SRS – at request of EAC, reduced from 15 years to 5 years the eligibility criteria for a surviving spouse to elect a 50% retirement allowance
  - Sept 14-Nov13 – SRS – one-time Open Season for Plan A members to switch to Plan B. Switching members must pay dif between 4 and 5<sup>1/3</sup>% plus 15% interest compounded annually for period between 7/1/81 (or appointment date) through payroll 2 1988. For those employees who switch, their contrib rate will be 5 1/3% starting with 1/19/88 paycheck. Reminders in 10/9, 10/23, & 11/6 Couriers (348 employees made the switch).

- 1988**
- July 1 – Sick leave used in average salary
  - July – When spouse option has been taken and retiree divorces, benefit can be reverted to what it would have been if part of divorce decree and when we have a copy of decree in this office (Coffman e.g.)
  - July – “One-time out” of Supplemental system for 20-hour employees; 20-hours hired after July/88-retirement is mandatory (no option)  
Reference made to Crossing Guards in ordinance on pg. 378, (§3-2-19 county code)
- 1989**
- Sept 26 – Clinic-room aides into Supplemental Retirement System granted back service for retirement purposes if they were active and working at time of approval; otherwise “no past service granted”
  - **Retirement benefits taxable by state of Virginia effective tax year 1989**
- 1990**
- July 1 – Hospitalization subs. increase from \$30 to \$45
  - Sept 17 – Board of Supervisors passed changes (pg. 8 of new ordinance), active members (currently on p/o) who may be contemplating re-purchase of refunded service must do so before March 17, 1991 or they cannot elect to do so at a later date (never). New hires after September 17, 1990 who have refunded service must make decision election to buy-back within 1-yr of reemployment . After these dates have expired, employees cannot ever purchase previous refunded service. *(Need to research when this changed again to current rules.)*
- 1993**
- Oct, Retirement office moved to 10680 Main Street
- 1995**
- July 1 – Additional 3% benefit increase for all systems
- 1996**
- Uniformed – reduced 66 2/3% SC Disability benefit to 40% & added severe SC benefit at 90% - additionally, offset rules were changed to apply offset only to SS disability benefits, not SS old-age benefits
  - Dec 9 – **Plans C & D offered to URS members** (one-time opportunity for existing members) – deadline to change, 3-21-97 (Plan C-4% contrib/Plan D-7.08%)
  - All new hires enter Uniformed Plan D (7.08%) - actually appears to have been offered to all URS members from 12-9-96 through 3-21-97 so it looks as if it was effective for all new hires as of March 21, 1997
- 1997**
- March 21 – effective date for new hires for Plan D
- 1998**
- July – Health subsidy raised to \$60 from \$45 for age 62 and older
- 2000**
- Feb – Police multiplier went from 2.5 to 2.8 – effective July 1, 2000 – current retirees (not disability) received 12% increase
  - Uniformed multiplier went from 1.8 to 2.0-A & B and from 2.3 to 2.5-C & D – retroactive to Jan 1, 2000 and later – at this time, SSBreakpoint was removed from Plans A&B because their % went up across the board from 1.8 to 2%
  - April – Open enrollment last spring OE *(rates for 18 months-7/00 to 12/01)*
  - July 1 – Supplemental (SRS) only – pre-62 Benefit becomes pre-SS

- July 1 – Health Subsidy increases from \$60 to \$100 and Age to receive subsidy lowers to age 55+ and those on disability
  - Nov – Open Enrollment moves from spring to fall
- 2001**
- Feb – **Supplemental System (SRS) now Employees’ System (ERS)**
  - Feb 26 – Police Board to increase from 5 to 7 *(effective July 9, 2002)*  
*(One retiree-elected member and an additional BOS appointed member)*
  - Feb 26 – Uniformed – elimination of SS offset due to unrelated disability regarding disability benefits from County
- 2002**
- March 19 – Uniformed pre-Social Security benefit added @ 0.3% for Plans C&D 0.2% pre-Social Security for Plans A&B
  - July 2 – new Police Trustees effective – finally after original proposal at Public Hearing on February 28, 2000
- 2003**
- July – Retiree Health Benefits Fund implemented (even though new OE rates do not go into effect until Jan. 2004) – most retirees see bigger check for Aug – Schools has not adopted variable subsidy yet
  - Oct – **DROP Implemented for Police & Uniformed Systems**
- 2004**
- Jan 1 – Uniformed Retiree increase – weighted average of 12% Plan A=23%; Plan B=15%; Plan C=5%; Plan D=5%; Survivors=10% Effective for those who retired prior to 3/19/02
  - July 1 – Health Benefit Subsidy amount changed (increased) for Medicare participants – General County
  - July – Retiree Health Benefits Fund implemented for School employees and adjusted for general County employees – adjusted Medicare subsidy for those with 20+ years of service
- 2005**
- March 21– New Ordinance language on reemployed annuitants 3-7-40 all 3 systems max of 115% cty ex of salary and retirement
  - July 1 – **DROP Implemented for members of Employees’ System**
  - July 1 – PSCC/DPSC New hires are enrolled in Uniformed
  - Oct 1 – DPSC Transfers Implemented for Employees to Uniformed - must make election on or before September 1, 2005
- 2006**
- Jan 1 Medicare Part D implemented<sup>2</sup> *(also called Medicare prescription drug benefit)*
- 2007**
- Jan – Implemented Pension Gold as RAA pension software
  - July – Police Contribution Rate lowered to **11%** from 12%
  - July – Police 84% cap (30 years) on benefits REMOVED – no longer is there a maximum
  - July 1 - E & U – SCD Social Security Offset reduced from 64% to 40%
- 2008**
- April – unveiled new RAA website, redesigned in Web Content Management (WCM)

- July – Unveiled Web Member Services (**WMS**) PensionGold on-line access software
  - July 1 – E & U SCD Social Security Offset reduced from **40% to 30%**
  - July 1 – Police Member contribution rate decreased from **11% to 10%**
  - DROP Sunset Provision equalized for all 3 systems – now Dec. 31, 2013
- 2009**
- Jan 2 - furlough date for County employees (announced Nov 2008 - 8 hrs for most)
  - July – military leave change
  - July 1 – Remarriage clause removed from *death before retirement* benefits for current spouses – All systems
  - July 1 – Service Credit rules changed for the purpose of providing members with free service credit for periods of Military LWOP for ERS and URS
- 2010**
- Oct 1 – COLA – Redefined Actuarial Surplus requirement for consideration of Ad-Hoc COLA adjustment (3-2-44; 3-7-37; 3-3-45)
  - **Oct – Repeal of DROP Sunset Provision in all three systems**
  - Oct – Employees of DPSC who are members of URS now entitled to vote for trustee on URS BOT (what running for office)
  - Nov – Open Enrollment moved by 2 weeks to be all of November
- 2011**
- Aug 1 – Social Security Offset reduced from 30% to 25% - ERS & URS
- 2012**
- Aug – Technical changes regarding taxes and Military leave credit
  - Oct 17 – Nov 17 Open Enrollment moved earlier again - 2 weeks
  - Need date – Certain Members of URS and PORS appointed to serve as a Dep County Exec shall, as long as already vested, be able to remain in their public safety plan, and not switch to ERS
- 2013**
- Jan 1 – New Retirement Plans for ALL new hires on and after Jan 1
    - \* ERS Plans C & D, *Rule of 85, earliest normal age 55*
    - \* PORS Plan B
    - \* URS Plan E
  - All 3 systems now capped for 2080 hours SL into Retirement or DROP*
  - No Pre-SSB in DROP – ERS & URS*
  - May 30 – IRS issued favorable determination letters for all 3 systems, contingent on adoption of proposed amendments the County submitted to the IRS (adoption must occur nlt 8/30/13)
- 2014**
- **Jan 1** - ERS & URS SCD Social Security Offset reduced **from 25% to 15%**
  - Jan 1 – URS BOT increases from 8 to 10 – added 1 additional appointed trustee and 1 elected by the retirees of the system (Retirement office will run this election.)
  - July – Police Member contribution rate decreased from 10% to **8.65%**
- 2015**
- January - All 3 codes were made more stylistically consistent, logically organized and freed of provisions no longer serving a useful purpose
- 2016**
- July - ERS & URS SCD Social Security Offset reduced **from 15% to 10%**