

Charter/Policy Name

Policy Owner: <i>PF/FED; CEO/CIO; Division</i>	Policy Version:
Effective Date: <i>XXXXXXXX</i>	Next Review Date: <i>XXXXXXXX</i>

PURPOSE [Required Section]

Describe why this document exists and what it is intended to achieve. Be concise, and clear – focus on objectives, not detailed steps or requirements.

Example:

For Charters – The purpose of this charter is to define the roles, responsibilities, and authority of [Board position/Committee] to ensure effective oversight of the Office of Retirement Services.

For Policies – The purpose of this policy is to provide guidance for [topic area] to ensure compliance with applicable laws, regulations, and organizational requirements.

SCOPE [Required Section]

Edit wording in first paragraph, as necessary:

This **Policy/Charter** applies to the Boards of the following retirement systems(and/or) Office of Retirement Services employees of the:

- ☐ Federated City Employees' Retirement System
- ☐ Police & Fire Department Retirement Plan

AUTHORITY & GOVERNANCE [Required Section]

This **[Charter/Policy]** is issued under the authority of the **[Federated City Employee's Retirement System/Police & Fire Department Retirement Plan]**

The Board of the above retirement plan(s) is responsible for approving and maintaining this document, including reviewing it periodically to ensure it remains accurate and up to date.

Implementation and administration of this Policy is the responsibility of the Office of Retirement Services (ORS) under the direction of the Chief Executive Officer.

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OVERVIEW [Required Section]

Contains content of the Policy/Charter/Procedure If sub-sections are needed, use the following format:

A. Subsection I Title

B. Subsection II Title

C. Subsection III Title

ROLES & RESPONSIBILITIES [Required for Charters/Policies only]

May not need to split this out into a separate & distinct section if reference roles & responsibilities already in the “Overview” section.

EXCEPTIONS & NON-COMPLIANCE [Required for Policies only]

Example: No exceptions to this Policy permitted without review by the Governance Committee. Non-compliance must be reported to the Governance Committee of the Boards.

DEFINITIONS [Optional]

Recommended for terms that are technical or likely to be misread in document.

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RELATED DOCUMENTS & REFERENCES [Optional]

Recommended to link to other related policies or procedures, City-related policies or codes, external laws, etc.

DOCUMENT REVIEW HISTORY [Required]

Version	Approval Date	Description of Changes
1.0	x/xx/xxxx	Creation of Policy
2.0	x/xx/xxxx	Reviewed and no changes were made.
3.0	x/xx/xxxx	Document changes made

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APPENDIX I [Optional]

Use section to add additional attachment(s).