

# LIVE VIRTUAL BOARD MEETING



TO VIEW VIA WEB



TO PROVIDE PUBLIC COMMENT

You may submit a request to speak during Public Comment or provide a written comment by emailing [PublicComment@lacera.com](mailto:PublicComment@lacera.com). If you are requesting to speak, please include your contact information, agenda item, and meeting date in your request.

**Attention:** Public comment requests must be submitted via email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com) no later than 5:00 p.m. the day before the scheduled meeting.

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION  
300 N. LAKE AVENUE, SUITE 650, PASADENA, CA

A REGULAR MEETING OF THE BOARD OF RETIREMENT  
LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA

9:00 A.M., WEDNESDAY, DECEMBER 2, 2020

This meeting will be conducted by the Board of Retirement by teleconference under the Governor's Executive Order No. N-29-20.

Any person may view the meeting online at  
[https://members.lacera.com/lmpublic/live\\_stream.xhtml](https://members.lacera.com/lmpublic/live_stream.xhtml)

*The Board may take action on any item on the agenda,  
and agenda items may be taken out of order.*

- I. CALL TO ORDER
- II. APPROVAL OF MINUTES
  - A. Approval of the Minutes of the Regular Meeting of November 4, 2020
- III. PUBLIC COMMENT

(\*You may submit written public comments by email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com). Please include the agenda number and meeting date in your correspondence. Correspondence will be made part of the official record of the meeting. Please submit your written public comments or documentation as soon as possible and up to the close of the meeting.

You may also request to address the Boards. A request to speak must be submitted via email to [PublicComment@lacera.com](mailto:PublicComment@lacera.com) no later than 5:00 p.m. the day before the scheduled meeting. Please include your contact information, agenda item, and meeting date so that we may contact you with information and instructions as to how to access the Board meeting as a speaker.)
- IV. OTHER COMMUNICATIONS
  - A. For Information
    - 1. October 2020 All Stars
    - 2. Award Recognitions

IV. OTHER COMMUNICATIONS

A. For Information (Continued)

3. Chief Executive Officer's Report  
(Memo dated November 18, 2020)

V. CONSENT ITEMS

- A. Ratification of Service Retirement and Survivor Benefit Application Approvals. (Memo dated November 23, 2020)

VI. NON-CONSENT ITEMS

- A. Recommendation as submitted by Barry W. Lew, Legislative Affairs Officer: That the Board authorize a one-year extension of the current contract 1) With Ackler & Associates and McHugh, Koepke & Associates commencing on January 1, 2021 and ending on December 31, 2021 to provide state legislative advocacy services; and 2) With Williams & Jensen and Doucet Consulting Solutions commencing on February 1, 2021 and ending on January 31, 2022 to provide federal legislative advocacy services.  
(Memo dated November 20, 2020)
- B. Recommendation as submitted by Carlos Barrios, Benefits Interim Division Manager: That the Board approve the reciprocal disability retirement for deferred members Glenn G. Bonde, Jeffrey A. Ditsch, Michael J. Ullerich, and Juan Chavez, Jr. who were found to be disabled by the current reciprocal agency for the performance of their duties and have met the burden of proof.  
(Memo dated November 19, 2020)
- C. Recommendation as submitted by Carlos Barrios, Benefits Interim Division Manager: That the Board approve Lenore Cutler's change of retirement date from August 25, 2018 to March 1, 2018, to conform with Internal Revenue Code (IRC) Section 401(a)(9). (Memo dated November 19, 2020)
- D. Recommendation as submitted by Santos H. Kreimann: That the Board review the 2021 meeting calendar and consider rescheduling meeting dates that conflict with a holiday and/or the potential of a lack of quorum.  
(Memo dated November 13, 2020)

VII. REPORTS

- A. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding an Update on Covid-19 Presumption for Disability Retirement. (Memo dated November 13, 2020)
- B. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding an Update on Legislative Proposal: Nonservice-Connected Disability Retirement. (Memo dated November 20, 2020)
- C. For Information Only as submitted by Barry W. Lew, Legislative Affairs Officer, regarding the 2020 Year-End Legislative Report. (Memo dated November 23, 2020)
- D. For Information Only as submitted by Ted Granger, Interim Chief Financial Officer, regarding the following reports:
  - Monthly Education and Travel Reports for October 2020  
(Public Memo dated November 18, 2020)  
(Confidential Memo dated November 18, 2020 – Includes Anticipated Travel)
  - 1<sup>st</sup> Quarter Education and Travel Expenditure Reports  
(Memo dated November 18, 2020)
- E. For Information Only as submitted by Steven P. Rice, Chief Counsel, regarding the November 2020 Fiduciary Counsel Contact and Billing Report. (Memo dated November 23, 2020) (Privileged and Confidential Attorney-Client Communication/Attorney Work Product)

VIII. ITEMS FOR STAFF REVIEW

IX. GOOD OF THE ORDER  
(For information purposes only)

X. EXECUTIVE SESSION

- A. Conference with Legal Counsel – Anticipated Litigation Significant Exposure to Litigation (Pursuant to Paragraph (2) of Subdivision (d) of California Government Code Section 54956.9)

Number of Cases: 2

XI. ADJOURNMENT

*Documents subject to public disclosure that relate to an agenda item for an open session of the Board of Retirement that are distributed to members of the Board of Retirement less than 72 hours prior to the meeting will be available for public inspection at the time they are distributed to a majority of the Board of Retirement Members at LACERA's offices at 300 N. Lake Avenue, Suite 820, Pasadena, CA 91101, during normal business hours of 9:00 a.m. to 5:00 p.m. Monday through Friday.*

*\*Requests for reasonable modification or accommodation of the telephone public access and Public Comments procedures stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000, Ext. 4401/4402 from 8:30 a.m. to 5:00 p.m. Monday through Friday or email [PublicComment@lacera.com](mailto:PublicComment@lacera.com), but no later than 48 hours prior to the time the meeting is to commence.*

MINUTES OF THE REGULAR MEETING OF THE BOARD OF RETIREMENT  
LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA

9:00 A.M., WEDNESDAY, NOVEMBER 4, 2020

This meeting was conducted by the Board of Retirement by teleconference under the Governor's Executive Order No. N-29-20.

PRESENT: Herman Santos, Chair

Vivian H. Gray, Vice Chair

Gina Zapanta, Secretary (Arrived at 9:08 a.m. and departed at 9:38 a.m.)

JP Harris (Alternate Retired)

Shawn R. Kehoe

Keith Knox

Wayne Moore

Ronald Okum (Arrived at 9:04 a.m.)

William Pryor (Alternate Safety)

Les Robbins

Thomas Walsh

STAFF ADVISORS AND PARTICIPANTS

Santos H. Kreimann, Chief Executive Officer

John Popowich, Assistant Executive Officer

Jon Grabel, Chief Investments Officer

Steven P. Rice, Chief Counsel

Michael Herrera, Senior Staff Counsel

STAFF ADVISORS AND PARTICIPANTS (Continued)

Ricki Contreras, Disability Retirement Services Manager

Francis J. Boyd, Senior Staff Counsel

Vincent Lim, Disability Litigation Manager

Allison E. Barrett, Senior Staff Counsel

Eugenia W. Der, Senior Staff Counsel

Jason E. Waller, Senior Staff Counsel

Ricki Contreras, Disability Retirement Services Manager

Tamara Caldwell, Disability Retirement Specialist Supervisor

Hernan Barrientos, Disability Retirement Specialist Supervisor

Kerri Wilson, Disability Retirement Specialist Supervisor

Ricardo Salinas, Disability Retirement Specialist Supervisor

Ted Granger, Interim Chief Financial Officer

Kimberly Hines, Administrative Services Division Manager

Carly Ntoya, Human Resources Division Manager

Roberta Van Nortrick, Training Coordinator

Barry Lew, Legislative Affairs Officer

Kathy Delino, Interim Manager, Systems Division

I. CALL TO ORDER

The meeting was called to order by Mr. Santos at 9:00 a.m. in the Board Room of Gateway Plaza.

## II. APPROVAL OF MINUTES

- A. Approval of the Minutes of the Regular Meeting of October 7, 2020
- B. Approval of the Minutes of the Regular Meeting of October 15, 2020

Mr. Kehoe made a motion, Mr. Pryor seconded, to approve the minutes of the regular meeting of October 7 and October 15, 2020. The motion passed (roll call) with Messrs. Knox, Walsh, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

## III. PUBLIC COMMENT

There were no requests from the public.

## IV. OTHER COMMUNICATIONS

### A. For Information

#### 1. September 2020 All Stars

Mr. Popowich announced the winners for the month of September: Erika Heru, Elizabeth Smith, Maria Luna, and Tony Soto.

#### 2. Chief Executive Officer's Report (Memo dated October 26, 2020)

(Mr. Okum joined the meeting at 9:04 a.m. and Ms. Zapanta joined at 9:08 a.m.)

Mr. Kreimann shared that there was a great response from members who participated in the virtual retirement seminars. In addition, he shared that the Board of Supervisors certified the election results and he congratulated returning Board of Retirement trustees Herman Santos, Les Robbins, and JP Harris. Furthermore, Mr. Kreimann provided an update regarding the communication that will be sent to the County regarding the election addressing what worked and what didn't work. Lastly, he provided an update regarding the status of the outstanding positions. Mr. Santos commented that the County should permit



IV. OTHER COMMUNICATIONS (Continued)

A. For Information

2. Chief Executive Officer's Report  
(Memo dated October 26, 2020)

electronic signatures on nominating petitions; Mr. Harris and Ms. Gray expressed their agreement.

V. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement  
Service-Connected Disability Applications

On a motion by Ms. Gray, seconded by Mr. Okum, the Board of Retirement approved a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Robbins, Kehoe, Santos, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
337D	KENNETH R. FONTANILLA
338D	MIGUEL A. ORELLANA
339D*	OSVALDO SANTA ANA
340D	MIGUEL A. PENA-ALVAREZ
341D	LAVONCE D. JEFFREY
342D	LEON A. MOORE
343D*	MANUEL D. SCRUGGS

\*Granted SCD – Employer Cannot Accommodate

V. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
344D	DEREN K. BRADY
345D	FRANK E. JINRIGHT
346D*	SCOTT A. EDGE
347D	KANNAH MARIE D. SAAVEDRA
348D*	PAISLEY E. VELASQUEZ

Safety Fire, Lifeguards  
Service-Connected Disability Applications

On a motion by Mr. Kehoe, seconded by Mr. Okum, the Board of Retirement approved a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Robbins, Kehoe, Santos, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
1289B	DARRELL D. CHAPMAN
1290B	VICTOR M. MARIN
1291B	PAUL W. SIMPSON
1292B	JOHN E. BRONDYKE
1293B	EDWARD G. JOHNSON

\*Granted SCD – Employer Cannot Accommodate

V. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Fire, Lifeguards (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
1294B	RICKY G. DRENDEL
1295B*	KEVIN E. WILLIAMS
1296B	ERIC J. FETHERSTON
1297B	RANDY D. BROWN
1298B	MARK A. ORTIZ

General Members  
Service-Connected Disability Applications

On a motion by Ms. Gray, seconded by Mr. Okum, the Board of Retirement made a motion to approve a service-connected disability retirement for the following named employees who were found to be disabled for the performance of their duties and have met the burden of proof. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Robbins, Kehoe, Santos, Ms. Gray and Ms. Zapanta voting yes.

<u>APPLICATION NO.</u>	<u>NAME</u>
2140C**	DIANA BORUNDA
2141C**	BEVERLY A. HYNES
2142C	JOHNNY R. GUSTAVIA
2143C**	KIM E. PAVEK

\*Granted SCD – Retroactive

\*\*Granted SCD – Employer Cannot Accommodate

V. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
2144C*	LILLIAN L. POUNDS
2145C**	NORMA M. BUENO

VI. CONSENT ITEMS

Mr. Okum made a motion, Mr. Knox seconded, to approve the following items. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Kehoe, Robbins, Santos, Ms. Gray and Ms. Zapanta voting yes.

- A. Ratification of Service Retirement and Survivor Benefit Application Approvals. (Memo dated October 26, 2020)
- B. Recommendation as submitted by Ricki Contreras, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Nariman Amjadi's appeal for a service-connected disability retirement. (Memo dated October 21, 2020)
- C. Recommendation as submitted by Thomas Walsh, Chair, Operations Oversight Committee: That the Board approve and adopt the Post Retirement Employment Policy. (Memo dated October 20, 2020)

VII. EXCLUDED CONSENT ITEMS

There were no items to address.

\*Granted SCD – Retroactive

\*\*Granted SCD Retroactive – Employer Cannot Accommodate

## VIII. NON-CONSENT ITEMS

- A. Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits and Legislative Committee: That the Board direct its voting delegate to vote YES on sponsorship by the State Association of County Retirement Systems (SACRS) of “COVID-19 Disability Retirement Presumption” for the SACRS 2021 legislative platform. (Memo dated October 15, 2020) (Supplemental Memo dated October 23, 2020)

Mr. Lew was present to answer questions from the Board.

Mr. Kehoe made a motion, Mr. Okum seconded, to approve the recommendation. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Kehoe, Robbins, Santos, Ms. Gray and Ms. Zapanta voting yes.

## IX. REPORTS

- A. For Information Only as submitted by Ricki Contreras, Division Manager, Disability Retirement Services, regarding the Application Processing Time Snapshot Reports. (Memo dated October 27, 2020)

Ms. Contreras was present to answer questions from the Board.

- B. For Information Only as submitted by Ted Granger, Interim Chief Financial Officer, regarding the Semi-Annual Interest Crediting for Reserves as of June 30, 2020 (AUDITED). (Memo dated October 22, 2020)

Mr. Granger was present to answer questions from the Board.

- C. For Information Only as submitted by Ted Granger, Interim Chief Financial Officer, regarding the Monthly Education and Travel Report for September 2020. (Public Memo dated October 23, 2020) (Confidential Memo dated October 23, 2020 – Includes Anticipated Travel)

Mr. Granger was present to answer questions from the Board.

- D. For Information Only as submitted by Steven P. Rice, Chief Counsel, regarding the October 2020 Fiduciary Counsel Contact and Billing Report. (Memo dated October 26, 2020) (Privileged and Confidential Attorney-Client Communication/Attorney Work Product)

IX. REPORTS (Continued)

Mr. Rice was present to answer questions from the Board.

X. ITEMS FOR STAFF REVIEW

There were no items to report.

XI. GOOD OF THE ORDER  
(For information purposes only)

Ms. Gray encouraged trustees to attend the virtual SACRS Conference.

XII. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability (Ms. Zapanta left the meeting at 9:38 a.m.)

APPLICATION NO. & NAME

BOARD ACTION

5151B –SHARINNA JOHNSON

Mr. Kehoe made a motion, Mr. Pryor seconded, to grant a nonservice-connected disability retirement pursuant to Government Code Sections 31720 and 31724 since the employer cannot accommodate. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

5152B – LINDA J. CRAFT

Mr. Kehoe made a motion, Ms. Gray seconded, to grant a service-connected disability retirement.

The makers of the motion amended their motion to return to staff for additional information. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

XII. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability (Continued)

APPLICATION NO. & NAME

BOARD ACTION

5153B – TYRELL L. RICHMOND

Ms. Gray made a motion, Mr. Kehoe seconded, to grant a service-connected disability retirement.

Ms. Gray made a substitute motion, Mr. Santos seconded, to refer back to staff for additional information. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

5154B – REBECCA RAMIREZ

Mr. Pryor made a motion, Mr. Knox seconded, to deny and find the applicant not permanently incapacitated since the employer can accommodate. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

1252B – MARK D. WHALING

Mr. Pryor made a motion, Ms. Gray seconded, to grant a service connected disability retirement pursuant to Government Code Section 31720. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Pryor, Robbins, Santos, and Ms. Gray voting yes.

5001B – SILVIA DIHARCE

Mr. Okum made a motion, Ms. Gray seconded, to grant a service connected disability retirement pursuant to Government Code Section 31720. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe,

XII. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability (Continued)

APPLICATION NO. & NAME

BOARD ACTION

5122B – THANH M. LY

Robbins, Santos, and Ms. Gray voting yes.

Ms. Gray made a motion, Mr. Santos seconded, to grant a service connected disability retirement.

Ms. Gray made a substitute motion, Mr. Okum seconded, to refer back to staff for additional information. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

B. Disability Retirement Appeals

APPLICATION NO. & NAME

BOARD ACTION

FARAHNAZ HINOJOSA - Thomas J. Wicke for the Applicant  
Jason E. Waller for the Respondent

Mr. Okum made a motion, Mr. Kehoe seconded, to grant a service-connected disability retirement. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

JIMMIE SMITH - Thomas J. Wicke for the Applicant  
Jason E. Waller for the Respondent

Mr. Okum made a motion, Ms. Gray seconded, to grant a service-connected disability retirement. The motion passed (roll call) with Messrs. Knox,



XII. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

B. Disability Retirement Appeals (Continued)

APPLICATION NO. & NAME

BOARD ACTION

Walsh, Moore, Kehoe, Santos, and Ms. Gray voting yes; and Messrs. Okum and Robbins abstaining.

C. Staff Recommendations

Mr. Kehoe made a motion, Mr. Okum seconded, to approve the following items XII. C. 1 and C.2. The motion passed (roll call) with Messrs. Knox, Walsh, Okum, Moore, Kehoe, Robbins, Santos, and Ms. Gray voting yes.

1. Recommendation as submitted by Eugenia W. Der, Senior Staff Counsel: That the Board, pursuant to Government Code section 31541.1, (1) Find that Marcos Zamora delayed filing his application for disability retirement because he was unable to ascertain the permanency of his incapacity; (2) that his application is deemed filed on the day after the last day of regular compensation (retroactive) in accordance with Government Code section 31724; and (3) that he is entitled to the option of an earlier effective date. (Memo dated October 22, 2020)
2. Recommendation as submitted by JJ Popowich, Assistant Executive Officer: That the Board approve the service provider invoices for Winet Patrick Gayer Creighton & Hanes. (Memo dated October 19, 2020)
3. For Information Only as submitted by Ricki Contreras, Division Manager, Disability Retirement Services, regarding the 2020 Quarterly Reports of Paid Invoices – 3<sup>rd</sup> Quarter. (Memo dated October 19, 2020)

Ms. Contreras was present to answer any questions from the Board.

XIII. EXECUTIVE SESSION

- A. Conference with Legal Counsel – Anticipated Litigation  
Significant Exposure to Litigation (Pursuant to Paragraph (2) of Subdivision  
(d) of California Government Code Section 54956.9)

1. Administrative Appeal of Glen Williams

The Board met in executive session with counsel to discuss this matter. On a motion by Mr. Kehoe, seconded by Mr. Robbins, the Board voted 8-0 to deny the administrative appeal of Glen Williams for reciprocal retirement benefits from LACERA. Messrs. Santos, Kehoe, Robbins, Walsh, Moore, Okum, and Knox and Ms. Gray voted yes. Ms. Zapanta was not present.

XIV. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 11:27 a.m.

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GINA ZAPANTA, SECRETARY

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HERMAN SANTOS, CHAIR



November 18, 2020

TO: Each Trustee,  
Board of Retirement  
Board of Investments

FROM: Santos H. Kreimann *SHK*  
Chief Executive Officer

SUBJECT: **CHIEF EXECUTIVE OFFICER'S REPORT**

I am pleased to present the Chief Executive Officer's Report for November 2020 that highlights a few of the operational activities that have taken place during the past month, key business metrics to monitor how well we are meeting our performance objectives, and an educational calendar.

**Election 2020 Welcoming New and Returning Trustees to LACERA Boards**

At its October 13, 2020 meeting the Board of Supervisors certified the LACERA election results. We are pleased to officially congratulate the following returning Trustees:

David Green – Second Member, Board of Investments  
Joseph Kelly – Eighth Member, Board of Investments  
Herman B. Santos – Second Member, Board of Retirement  
Leslie “Les” Robbins – Eighth Member, Board of Retirement  
James “J.P.” Harris – Alternate Retired Member, Board of Retirement

Historically, the Registrar-Recorder conducted the LACERA elections by mailing a ballot to all eligible active and retired members, who in turn submit their filled-out ballots by mail. The 2020 election marked the first time the Executive Office of the Board of Supervisors held the general elections using a vendor that offers online and telephonic voting options. Mail-in ballots were not distributed to General active members, and retirees were mailed ballots only upon request. As announced by the Executive Office, the new election process saw a 43.7 percent increase in participation by General active members. At the same time, the electronic voting options and restricted mail-in process resulted in a 22.7 percent decrease in participation by retired members.

At the September 2, 2020 Board of Retirement meeting we discussed the new process and the retiree experience. We addressed our concerns about the changes and how the new process disenfranchised some retiree members who could not be reached electronically or could not vote with the new online process. Accordingly, we will be working with the County to try and restore the paper ballot process for retirees.

On November 16, 2020, I hand delivered a letter to Celia Zavala, Executive Officer for the Executive Office of the Board of Supervisors, regarding our insights surrounding the 2020 Trustee elections. I congratulated her team on their success of increasing the turnout for active general members, and shared our deep concern over the sharp decrease in turnout for retired members. I shared the Trustees' clear desire and expectation to see a physical ballot mailed in future retired elections until such time as empirical data demonstrates that increased usage by retirees for electronic voting is equal to or greater than voting by physical ballots.

I also took the steps to open a discussion with the Executive Office and the Registrar-Recorder to look into adopting an electronic signature acceptance process for nominating petitions. We will continue to work to address Trustee concerns about ensuring that all future elections are easily accessible by all eligible members.

### **COVID-19 Response Update**

Conditions in Los Angeles County, California, and across the nation continue to degrade as a large surge in reported infections and hospitalizations occurs. Recently, California Governor Newsom issued new guidelines causing several counties surrounding Los Angeles County to change to the purple tier – the tier representing the highest risk and with the most restrictions. New guidelines were issued on Personal Protection Equipment (PPE) – requiring everyone to wear face coverings anytime they are in public – and unable to maintain social distancing of at least 6 feet. LACERA continually reviews and updates our protocols to remain consistent with current guidelines. The Business Continuity and HR teams reviewed those protocols and updated them on November 18, 2020 (Attachment 1).

Also, on November 17, 2020, Los Angeles County Public Health Officials issued new restrictions on restaurants, breweries, bars, wineries, and non-essential retail establishments. These restrictions include a curfew between the hours of 10:00 p.m. to 6:00 a.m. Additional restrictions state that no more than 15 people may be present at any outdoor gathering and they may not represent members from any more than three families. Other restrictions limit retail businesses and offices to no more than 25% capacity.

LACERA is not immune to the surge in cases. During the months of October and November we had 12 incidents where a staff member reported being around someone who tested positive for COVID-19 or tested positive themselves. This resulted in several staff members having to quarantine, including an entire team in our Document Processing Center (DPC). Fortunately, none of these cases has resulted in serious illness, but the risk of future incidents remains high.

Due to the efforts we have taken to date, LACERA is as well prepared as we can be at this time. Our remote teleworking program allows us to operate with only about 15-25% of staff in the office on any given day. We continue to make physical modifications to office spaces to protect support staff whose work requires them to come into work, and to prepare for that day when this surge

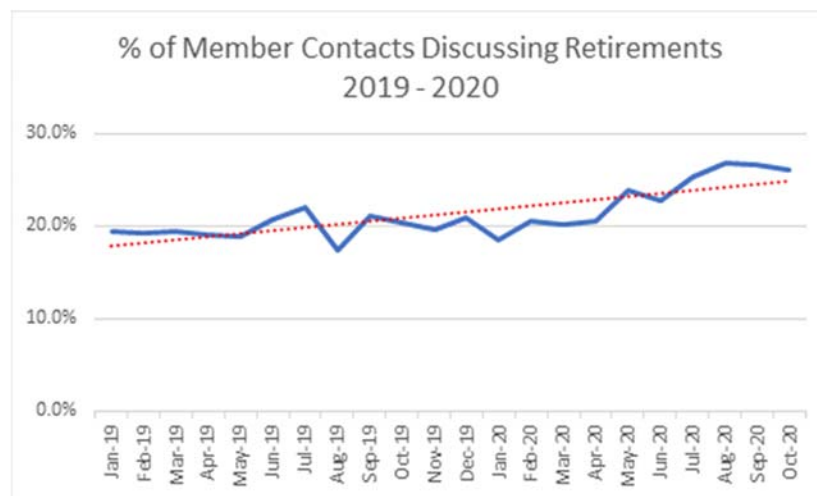
subsidies and we can bring people back to work onsite at LACERA. The workspaces of the Financial Accounting Services Division and the sixth-floor Reception area are scheduled to be fitted with taller partitions by December 7<sup>th</sup>. DPC will follow shortly thereafter as we finalize the appropriate plans. Additional work areas will be updated in the coming months.

I would like to take this time to thank the Business Continuity and HR teams for their efforts in coordinating the response. I would also like to thank LACERA staff members for remaining flexible as we adjust to the continuing challenges presented by this pandemic, and for remaining focused on meeting our mission.

### **Preparing for March Madness**

We are just days away from the traditional start of our annual March Madness season. We refer to the period beginning in December through the end of March as “March Madness” because retirements tend to spike during this period as members desire to retire in time to be eligible for any April 1<sup>st</sup> cost-of-living adjustment (COLA) that may be approved. As we have in years past, we will be continuing our commitment to share the annual March Madness statistics in the Chief Executive Officer's report.

Member Services keeps track of the reasons why members contact us and we have noticed an increase in inquiries for retirement counseling over the last few months. The chart below shows a steady increase in “retirement counseling” calls.



Over the last five months we have averaged almost 5,000 member contacts requesting retirement counseling vs. an average of almost 4,000 calls in the same period in 2019. This may be an early indicator of a heavier than usual March Madness season.

The Member Services Operation Group is starting discussions on how we may respond to the heavier than normal call volumes. Our MSC staff, those that normally do the face-to-face counseling, is operating at about 80% of their normal capacity. Typically, we offer about 50

counseling sessions per day, and we are currently offering about 30 per day. This is partially a result of reduced staffing levels due to recent retirements and leaves of absence. In an effort to compensate, we are training Retirement Benefit Specialists who work in the Member Services Call Center on the procedures for retiring a member in the Member Service Center. This will allow us to offer additional virtual counseling appointments to members.

We are also evaluating the feasibility of offering additional webinars and counseling on the weekends as we have done in the past.

Likewise, we expect this to be another busy year for Retiree Healthcare (RHC). RHC will see a similar spike in contacts from members who are retiring and transitioning to LACERA administered health plans due to March Madness. At the same time, RHC will be dealing with the annual increase in calls due to the annual Medicare Part B reimbursement program's 2021 Medicare Part B premium amount verification. We are currently waiting for the Board of Supervisor's approval to continue the Medicare Part B Premium Verification Program for 2021. Once this occurs, RHC will mail all eligible retirees and survivors a request for verification of their new 2021 Part B premium amount. The County will only reimburse up to the standard Part B amount, which is \$148.50 for 2021, as announced by the Centers for Medicare and Medicaid Services (CMS).

RHC is working with Communications and Member Services to help prepare communications to our members that will be as clear as possible to help members understand what documentation they need to submit for Medicare Part B reimbursement. As in previous years, examples of Social Security and Medicare Premium verifications will be uploaded to the website to assist members and staff. The team applies lessons learned from past years to create the most helpful documentation. However, as we have seen in the past years, we still expect a significant amount of calls from members with questions and wishing to verify they have submitted what they need. During the 2019-2020 verification period, RHC received an average of 5,800 calls between January and March vs. an average of 5,166 calls between June and September (the months preceding the re-opening of the RHC Call Center) and representing a more normal call volume. Additionally, the team received over 187,000 Part B work objects from members in the first half of 2020 related to the Part B verification. It is anticipated that this year we will see an increase due to new retirees and members who are getting accustomed to the process.

RHC is also working with Member Services to train them to answer basic Part B questions about what members need to do in submitting their verifications timely and contacting the right agencies such as Social Security and Medicare. We hope this will lessen the impact of an increased amount of calls to the smaller RHC Call Center.

## **Normalizing Member Services Outreach Efforts**

October has been a busy month in our efforts to normalize Member Services Outreach operations in the COVID-19 “new normal” era.

Earlier in the year we began partnering with Empower to provide our Pre-Retirement webinars with their weekly webinar series. This partnership continued throughout the month of October as we participated in their webinar outreach events. Working together, we were able to provide Pre-Retirement seminars to 257 members. Additionally, we served another 190 members by offering our new Retiree Healthcare webinar.

October also provided Outreach the opportunity to continue to normalize operations by providing virtual webinars and benefit tables at the request of DPSS and SEIU. LACERA has traditionally offered workshops for specific departments and would operate benefit tables at all manner of events held for LA County employees. At the request of SEIU, we provided Virtual Benefit tables at seven SEIU Virtual Benefit Webinars, allowing us to answer questions for 214 members. Additionally, at the request of DPSS, we provided a Pre-Retirement webinar to 146 members.

Outreach staff members also partnered with the Superior Court Human Resources to assist them with the rollout of their Voluntary Separation Incentive program. Staff developed a special presentation which we provided to 76 eligible Superior Court employees. This program helped educate members before making a decision to take advantage of the program. We have included the webinar presentation as an attachment to this report.

Beginning on October 15, 2020, we began accepting appointments for members to sign up to attend one of our new virtual webinars that have filled in for the in-person workshops that we cannot offer due to the pandemic. Members can sign up for webinars designed for 1) new members, 2) “Making the Most of Your Retirement Plan” Mid-Career, 3) Pre-Retirement, and 4) new Retiree Healthcare webinars. The response has been tremendous and because we are offering these virtually we are able to reach more members at one time than we would normally if we held these in our offices due to space limitations. While we don’t have the final numbers for November yet, here is a breakdown of the attendance so far:

<b>Mid-Career</b>	
November 3, 2020	62
November 5, 2020	79
<b>Pre-Retirement</b>	
November 3, 2020	181
November 5, 2020	189
<b>Retiree Healthcare</b>	
November 5, 2020	184
November 10, 2020	116

We are also pleased to announce that, even in the midst of a pandemic, we are developing new webinars as part of our long-standing goal of creating a Retirement University (a series of courses you can choose to take one at a time to learn about your retirement benefits). We will be holding our first Power of Attorney (POA) webinar later this month. We already have 20 members signed up. This new webinar will explain our Special Durable Power of Attorney form and help members understand how to complete the form.

### **Welcoming New Members and Transitioning Retiring Members**

I recently had the pleasure of welcoming Supervisor-elect Holly Mitchell to LACERA membership. One of the services we offer are new member workshops or webinars. In the pre-COVID-19 world, Outreach staff members provided new member workshops for groups of 10 upon request by LA County Departments. When a new Supervisor is elected, or a new Department Head is hired, we partner with LA County Human Resources and other business partners like Empower as the new member goes through the County's on-boarding process. Michael Peterson, Senior Retirement Benefits Specialist, and I spent time with Supervisor-elect Mitchell helping her understand LACERA's mission and important information about choices she has as a new member. I will be scheduling a meeting with Supervisor Mitchell at a later date to further discuss LACERA and important issues facing the system.

We also worked to help transition several staff in the District Attorney's Office as they are leaving County service. At the request of the department, each staff member participated in our standard one-on-one counseling session as we assisted them with the retirement process.

SHK: jp  
CEO Report November 2020.doc

Attachments





## **COVID-19 EXPOSURE RESPONSE PROTOCOL (Updated 11/20/2020)**

The cooperation of all LACERA staff members is necessary to create a safe and beneficial work environment. As an organization, LACERA will follow Federal, State, County and both Pasadena and Los Angeles City rules related to health and safety regarding this pandemic. All staff members are required to follow health and safety guidelines in order to create and maintain a safe and productive work environment.

The first step in protecting staff members is to ensure that LACERA is following the Organizational Protocols outlined in the Phased Return to Work Transition Plan which includes the following:

### **LACERA shall:**

- Follow the most updated Public Health guidelines for employers.<sup>1 2</sup>
- Promote and ensure appropriate physical distancing of six feet.
- Limit staff to groups of no more than 15 in work spaces and meeting rooms.
- Educate on the proper use of personal protective equipment (PPE) including the wearing of cloth face coverings.
- Promote and educate staff members on measures for hand hygiene, including providing hand sanitizer for staff usage.
- Ensure the Office of the Building regularly cleans workplaces, meeting rooms and common areas within LACERA, and may assign specific staff members, on a rotational basis, to help keep specific areas clean.
- Disseminate messaging to educate and remind staff members of important precautionary health measures.
- Minimize contact among workers, clients, and customers by replacing face-to-face meetings with virtual communications and implementing telework wherever feasible.
- Restrict the movement of staff between floors and work areas for essential and for as needed business purposes only.

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<sup>1</sup> [http://www.publichealth.lacounty.gov/media/Coronavirus/docs/protocols/Reopening\\_OfficeBasedWorksites.pdf](http://www.publichealth.lacounty.gov/media/Coronavirus/docs/protocols/Reopening_OfficeBasedWorksites.pdf)

<sup>2</sup> <http://publichealth.lacounty.gov/acd/docs/COVHomeQuarantine.pdf>

- Continue to limit the number of staff in the office by using the Red/Blue/Black/Purple Team concepts.
- Report any direct exposure cases and confirmed cases of COVID-19 to the Office of the Building.
- Comply with all reporting requirements of AB 685<sup>3</sup> and SB 1159 including:
  - Report any confirmed cases of COVID-19 to Sedgwick, LACERA’s third-party Worker’s Compensation administrator.
  - Report outbreaks to local health officials. An outbreak is defined as three probable or confirmed COVID-19 cases within a 14-day period among staff at the same worksite.

The following are procedures and expectations LACERA will activate and adhere to in the event a staff member is exposed to COVID-19.

### **Staff Member Expectations and Protocols**

The process begins with Staff Members reporting any possible incidents. Therefore we begin this policy with expectations for Staff Members.

#### **Staff Members shall:**

- Follow the most updated Public Health orders and guidelines for individuals.
- Wear a face covering whenever they are in contact or likely to come in contact with others. Face coverings shall maintain professionalism and comply with LACERA’s Dress Code Policy.
  - a) Staff members are not required to wear a face covering when they are alone in an office or a cubicle with a solid partition that exceeds the height of the staff member when standing<sup>4</sup>.
- Notify their supervisor or manager that they are ill (i.e. displays symptoms; is suspected to have COVID-19; or tests positive of COVID-19).
- Notify their supervisor, manager, the Director of Human Resources, or the Executive Office, immediately that they have come in close contact with an infected person. Timely reporting is critical.
- A close contact is any of the following people who were exposed to an “infected person” while they are infectious:

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<sup>3</sup> <https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/Employer-Questions-about-AB-685.aspx>

<sup>4</sup> [http://www.publichealth.lacounty.gov/media/Coronavirus/docs/protocols/Reopening\\_OfficeBasedWorksites.pdf](http://www.publichealth.lacounty.gov/media/Coronavirus/docs/protocols/Reopening_OfficeBasedWorksites.pdf)

- a) an individual who was within 6 feet of the infected person for a total of 15 minutes or more over a 24-hour period
  - b) an individual who had unprotected contact with the infected person's body fluids and/or secretions.
- An infected person is anyone with COVID-19, or who is suspected to have COVID-19, and is considered to be infectious from 48 hours before their symptoms first appear until they are no longer required to be isolated. A person with a positive COVID-19 test but no symptoms is considered to be infectious from 48 hours before their test was taken until 10 days after their test.
- Staff members who fall into one of the above categories shall not come to work or remain at work once aware of illness or exposure to illness. Instead, staff members shall speak with their manager about their illness, level of exposure, potential exposure to others, requirement to self-isolate, telework options, and leave options. The specific length of the quarantine period shall be discussed with staff based on the circumstances of their symptoms and/or exposure. Examples of quarantine periods are contained in Attachment A of this protocol.

Staff may be required to quarantine even if they themselves are not symptomatic in order to protect themselves and others. Staff who are required to quarantine shall not come to work for the entire quarantine period. No supervisors or managers have authority to reduce or clear staff from quarantine. Once staff is on quarantine, only the Director of Human Resources and the Executive Office may authorize a return to work.

- All staff members who display symptoms; is suspected to have COVID-19; test positive for COVID-19; or have been in close contact as defined above, shall participate with their supervisor, manager, and Human Resources to perform contact tracing – the identification of staff members who have come into contact with a confirmed positive person, presumptive positive person, symptomatic person, or one who had close contact with a confirmed positive person, presumptive positive person or symptomatic person. Sample contact tracing questions are in Attachment B.
- Seek Medical attention if necessary and get tested for COVID-19 in order to take recommended precautions. LACERA will require anyone who displays symptoms while at work to be tested. Free testing locations are listed at <https://covid19.lacounty.gov/testing/>.
- Follow latest travel advisory from the State of California<sup>5</sup>, including quarantining after non-essential travel.

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<sup>5</sup> <https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/Travel-Advisory.aspx>

Mild symptoms of COVID-19 include fever, cough, shortness of breath, chills, repeated shaking with chills, muscle pain, headache, sore throat, or new loss of taste or smell.<sup>6</sup> For a comparison of flu symptoms and COVID-19 symptoms see <https://www.cdc.gov/flu/symptoms/flu-vs-covid19.htm>

Staff Members who have symptoms of serious illness such as trouble breathing, pressure or pain in chest, bluish lips or appear confused, should seek immediate medical attention. If these symptoms occur while at work, call 9-1-1.<sup>7</sup>

Staff members who develop symptoms of COVID-19 while in quarantine should contact their healthcare provider. Staff members are expected to update Human Resources of any changes in their condition such as testing positive or being diagnosed as having COVID-19 as soon as possible.

LACERA highly recommends testing of staff members who are symptomatic, had close contact with a person who has a confirmed infection, or had close contact with a person who displays symptoms (with or without a confirmed test) to be tested in order to take the recommended precautions. Free testing locations are listed at <https://covid19.lacounty.gov/testing/>

### **LACERA Staff Notification Policy**

LACERA is committed to being transparent and keeping all of our staff members reasonably informed of any incidents. LACERA is also committed to ensuring the privacy of any staff member who may be ill or exposed. LACERA will balance these two values by following these notification protocols.

1. LACERA Human Resources or Executive Office will notify all staff members of an incident as soon as reasonable and practical after the incident has been reported and the facts of the incident have been determined.
2. The notification will contain the general location of the incident and refer to the steps LACERA has taken – in accordance with this policy and any future guidelines from the public health authorities.
3. LACERA will also share the notification sent to staff with our business partners at SEIU.
4. The notification will not include any reference to any specific employee. LACERA has a duty to ensure the privacy of any staff member.
5. LACERA will follow up with periodic notifications regarding any incident if the situation changes.

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<sup>6</sup> [https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html?CDC\\_AA\\_refVal=https%3A%2F%2Fwww.cdc.gov%2Fcoronavirus%2F2019-ncov%2Fsymptoms-testing%2Findex.html](https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html?CDC_AA_refVal=https%3A%2F%2Fwww.cdc.gov%2Fcoronavirus%2F2019-ncov%2Fsymptoms-testing%2Findex.html)

<sup>7</sup> <http://publichealth.lacounty.gov/media/Coronavirus/docs/business/FAQ-Managers.pdf>

6. In the event of a staff member testing positive for COVID-19, LACERA will confirm that “a” staff member has tested positive, but will not confirm who that staff member is. Again, we have a duty to protect our staff member’s privacy.\*

\*Because LACERA’ exposure policy requires those with close contact to a member who is suspected of, or who may have COVID-19 to quarantine or self-isolate at home, a report of a positive test does not change how we respond to an incident, but may change how long we require those who have been required to quarantine or self-isolate to remain in that state.

### **Management Expectations and Protocols**

Managers and supervisors will also routinely remind staff members to follow general steps to prevent the spread of illness by frequent handwashing; discouraging staff members from using other staff’s phones, desks, offices, or other work tools and equipment; reminding staff to practice social distancing by maintaining a six-foot person-to-person distance; advising staff to clean and disinfect frequently touched objects and surfaces; and actively encouraging staff to stay home if they are sick.

Managers and supervisors are required to report any suspected or confirmed incidents to the Director of Human Resources and the Executive Office immediately to help protect other LACERA staff members or members. Time is of the essence in making reports. Furthermore managers and supervisors are expected to enforce all Organizational and Phased Transition Plan protocols. Managers and supervisors do not have authority to send staff home or decide when staff can come back to work, but rather are required to immediately report incidents and suspected violations of these protocols to the Director of Human Resources and the Executive Office, who will provide direction as to the proper response. These are part of management’s performance expectations going forward.

#### **Managers and Supervisors will:**

- Follow and apply the most updated Public Health guidelines for individuals and employers.
- Immediately inform the Director of Human Resources and the Assistant Executive Officer of any suspected cases, exposure, or expected exposure to COVID-19.
- Working with HR, the supervisor/manager shall discuss with the staff member their status (confirmed, suspected, or close contact with another confirmed or suspected positive person) to determine if the staff member should remain at or return to work.
- Discuss with the staff member their level of exposure to other staff members (contact tracing) to determine if other staff members should remain at or return to work. If quarantine is required, the amount of time will vary based upon the circumstance and will be determined and confirmed on a case-by-case basis. Examples are described in the attachment to this protocol. Managers and supervisors do not have authority to change the terms of quarantine,

such as an early release or extension; all decisions shall only be made by the Director of Human Resources and the Executive Office.

- Maintain confidentiality of staff member's protected health information. This information may be shared with the LACERA Incident Response Team (LIRT) in order to make appropriate decisions, but will not be shared with other staff members.
- Confer with self-isolating staff members to arrange for telework to the extent possible and reasonable.
- Work with Administrative Services to arrange for impacted work spaces and common areas to be cleaned.
- Notify the LACERA Incident Response Team if necessary.
- Coordinate with the Human Resources Division to provide leave paperwork to staff members who cannot telecommute during self-isolation or quarantine.

#### Additional Resources

List of [free testing sites](#) in Los Angeles County

County of Los Angeles [Health Officer Order](#), updated 11/20/2020

Examples of staff member illness and return to work timelines (adapted from the California Department of Public Health<sup>8</sup>)

Staff Member Situation	Need to Self-Quarantine?	Return to Work Conditions (As of September 18, 2020)	Resources for More Information (As of November 17, 2020)
<p><b>Example 1</b>  <b>Symptomatic Positive</b>            Staff Member with symptoms who is laboratory confirmed to have COVID-19</p>	Yes	At least 10 days have passed since symptoms first appeared; <b>and</b> at least 24 hours have passed since last fever without the use of fever-reducing medications; <b>and</b> symptoms (e.g., cough, shortness of breath) have improved.	<a href="#">Self-Isolation Guide</a> <a href="#">FAQs about testing</a>
<p><b>Example 2</b>  <b>Asymptomatic Positive</b>            Staff member never had symptoms and is laboratory confirmed to have COVID-19</p>	Yes	A minimum of 10 days have passed since the date of their first positive COVID-19 test. If they develop symptoms, then the criteria for laboratory confirmed cases with symptoms apply (example #1).	<a href="#">Self-Isolation Guide</a> <a href="#">FAQs about testing</a>
<p><b>Example 3</b>  <b>Symptomatic Negative</b>            Staff Member who had symptoms of COVID-19 but test result returned negative</p>	Yes	Use the same criteria as laboratory confirmed cases (example #1).	<a href="#">Self-Isolation Guide</a> <a href="#">FAQs about testing</a>
<p><b>Example 4</b>  <b>Symptomatic Untested</b>            Staff Member had symptoms of COVID-19 but was not tested</p>	Yes	Testing is highly recommended. If the staff member cannot be tested, use the same criteria for return to work as laboratory confirmed cases (example #1).	<a href="#">Self-Isolation Guide</a>

<sup>8</sup> <https://www.cdph.ca.gov/Programs/CID/DCDC/Pages/COVID-19/Workplace-Outbreak-Employer-Guidance.aspx#Xuv50TqknY.mailto>

Staff Member Situation	Need to Self-Quarantine?	Return to Work Conditions (As of September 18, 2020)	Resources (As of 11/17/20)
<p><b>Example 5</b>  <b>Close Contact and Asymptomatic Negative</b>  Staff Member never had symptoms but was tested due to close contact with a laboratory-confirmed case, and Staff Member’s test is negative</p>	<p>Yes</p>	<p>Employees should quarantine at home for 14 days after the last known close contact with the case patient. Symptoms can develop even after testing negative within 14 days after exposure. LIRT may consider allowing earlier return to work only for an employee in a critical position in which the essential operations of the workplace would be compromised by quarantine of the staff member and no alternate staff can perform the same role.</p>	<p><a href="#">Close Contact Self-Isolation Guide</a>  <a href="#">FAQs about testing</a></p>
<p><b>Example 6A</b>  <b>Close Contact and Asymptomatic Untested</b>  Staff Member had close contact to a laboratory-confirmed positive person at work, home, or in the community and Staff Member does not have symptoms.  OR  Staff Member refuses or is unable to be tested after close contact with a laboratory-confirmed case, despite recommendation for testing from LACERA management or healthcare provider, and Staff Member does not have symptoms.</p>	<p>Yes</p>	<p>Staff Member should be quarantined at home for 14 days after the last known close contact with the case patient. Testing is highly recommended; if testing has not occurred, LACERA management may consider allowing an employee who had close contact to a confirmed case to continue to work only in a critical position in which the essential operations of the workplace would be compromised by quarantine of the staff member and no alternate staff can perform the same role.  Even if they are not tested, the same criteria for return to work should be used as laboratory-confirmed cases (example #1).</p>	<p><a href="#">Close Contact Self-Isolation Guide</a></p>



<b>Staff Member Situation</b>	<b>Need to Self-Quarantine?</b>	<b>Return to Work Conditions</b> <i>(As of September 18, 2020)</i>	<b>Resources</b> <i>(As of 11/17/20)</i>
<p><b>Example 6B</b>  <b>Close Contact and Asymptomatic Untested</b>  Staff Member had close contact to a person with symptoms at work, home, or in the community and Staff Member does not have symptoms.  OR  Staff Member refuses or is unable to be tested after close contact with a person with symptoms, despite recommendation for testing from LACERA management or healthcare provider, and Staff Member does not have symptoms.</p>	<p>Yes</p>	<p>Staff Member should be quarantined at home for 14 days after the last known close contact with the case patient. Testing is highly recommended; if testing has not occurred, LACERA management may consider allowing an employee who had close contact to a suspected case to continue to work only in a critical infrastructure industry in which the essential operations of the workplace would be compromised by quarantine of the staff member and no alternate staff can perform the same role.  Even if they are not tested, the same criteria for return to work should be used as laboratory-confirmed cases (example #1).</p>	<p><a href="#">Close Contact Self-Isolation Guide</a></p>

Example of contact tracing questions with Staff Members:

- Currently, how are you feeling?
- Are you currently displaying any symptoms of Covid-19?
- When was the first day you had symptoms?
- Have you contacted a medical provider? Do you need help contacting a medical provider?
- When was the first day you felt ill?
- Were you tested for Covid-19?
  - When were you tested?
  - When do expect your results?
  - Do you plan on being tested?
- When was the last day you were at work?
- What locations did you visit when you were last at work?
- What locations did you visit any other days when you had symptoms?
- What locations did you visit 48 hours (2 days) before your first symptom?
  
- Based on a) your last day at work, b) 48 hours before you started feeling ill, or 3) when you were exposed to someone who is ill, who did you come into close contact with?
  - Close contact is with an individual who was within 6 feet of the infected person for more than 15 minutes; **OR** an individual who had unprotected contact with the infected person's body fluids and/or secretions.
- Have you spoken to your supervisor about the option to telecommute?

Example of contact tracing questions with Managers:

- What is your division's workflow for in-office staff members?
- Does this workflow involve close contact between in-office staff?
- Does this workflow involve the passing of work between in-office staff?
- Does this workflow involve interactions with staff members from different divisions?
- Based on the impacted staff member's last day in the office, could any of the above be different?
- If you were in the office did you observe any close contact that would lead us to expand our contact tracing to include additional staff members?
- Are you able to provide the impacted staff member work duties to perform while in quarantine?



# **VSIP – Superior Courts**

## **Voluntary Separation Incentive Program**

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**How Does This Affect  
LACERA Membership?**



# Overview

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- VSIP lump-sum payment is not pensionable.
- The lump-sum payment is subject to tax.
- VSIP does not require anyone to retire.
- Those who accept the VSIP are restricted from reemployment with the Courts for 3 Years.



# My Retirement

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- Defer your retirement
- Enter a reciprocal agency
- Withdraw contributions
- Retire
- Return to service

# Defer Your Retirement

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## Defer Contributions

- Accrue interest up to the assumed rate of return
- Age 72 mandatory distribution
- Retire when you become eligible
- All contributory plans must have 5 years minimum
- Plan E must have 10 years minimum

Remember to keep your address and phone number up to date with LACERA

# Enter Reciprocal Agency

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## Benefits:

- Helps meet minimum retirement eligibility requirements
- Highest final compensation either agency
- Separate retirement checks
- LACERA health insurance based on LACERA service only
  - LA City exception

LACERA has reciprocity within California public retirement systems only.

# Enter Reciprocal Agency

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## Requirements:

- Join within 6 months of leaving prior system
- No overlap in service
- Must retire from all agencies on the same day
- Must apply with each agency separately
- May not withdraw while employed at either agency

Benefit limitations apply to a reciprocal member who applies for a disability retirement.



# Withdraw Your Contributions

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- Waive your right to future benefits
- 2 Methods
  - Direct rollover into Tax-Qualified Plan
    - Preserves your savings for retirement
    - EXCEPTION: After-tax contributions cannot be rolled over
  - Paid directly to you:
    - 20% mandatory Federal tax withheld
    - Possible Tax penalty under age 59 ½

# Retirement

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## Goodbye Tension, Hello Pension!

- Receive a guaranteed life-time pension
- Receive subsidized medical, dental and vision insurance
  - 10+ years service

Retirees seeking employment by the County of Los Angeles, LACERA, Local Agency Formation Commission, or the Little Lake Cemetery must go through the Return to Work process and cannot enter less than 180 days from retirement.

# Changing Your Mind

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## Must be in writing! Inform your department

- Complete the Request to Rescind or Change Retirement Date form
  - Go to Brochures & Forms page – [www.lacera.com](http://www.lacera.com)
  - Before 5:00 PM on the business day prior to retirement date

Note that the deadline date to rescind your retirement may not be the same deadline date to rescind your VSIP application.

# Return to Service

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## Scenario: Defer Contributions\*

- Return to Superior Court after 3-year break:
  - Same plan, same age
- Return to other employer covered by LACERA within 6 months:
  - Same plan, same age
- Return to other employer covered by LACERA after 6 months:
  - New Plan – PEPRA and maintain a double plan

# Return to Service

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## Scenario: Minimum 10 years Plan E

- Return to Superior Court after 3-year break:
  - Remain in Plan E
- Return to other employer covered by LACERA within 6 months:
  - Remain in Plan E
- Return to other employer covered by LACERA after 6 months:
  - Enter into New Plan – PEPRA
  - Retain Plan E credit – double account
- Plan E is forfeited if you terminate service with less than 10 years

# Return to Service

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## Scenario: Defer – PPT last in Plan E - Vested

- Return to Superior Court after 3-year break:
  - Return to Plan E. Retain Plan D service.
- Return to other employer covered by LACERA within 6 months:
  - Return to Plan E. Retain Plan D service.
- Return to other employer covered by LACERA after 6 months:
  - Enter into New Plan – PEPRRA. Retain Plan E & Plan D credit.

# Return to Service

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## Scenario: Defer – PPT last in Plan E – Non-Vested

- Return to Superior Court after 3-year break:
  - New Plan – PEPRA. Plan D contributions can be left on deposit.
- Return to other employer covered by LACERA within 6 months:
  - New Plan – PEPRA. Plan D contributions can be left on deposit.
- Return to other employer covered by LACERA after 6 months:
  - New Plan – PEPRA. Plan D contributions can be left on deposit.

# Return to Service

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## Scenario: Defer – PPT last in Plan D – (not withdrawn)

- Return to Superior Court after 3-year break:
  - Same plan, same age. Retain Plan E credit if vested under combine plans.
- Return to other employer covered by LACERA within 6 months:
  - Same plan, same age. Retain Plan E credit if vested under combine plans.
- Return to other employer covered by LACERA after 6 months:
  - New Plan – PEPRA. Retain Plan D credit Retain Plan E if vested under combined Plans D & E.



# Return to Service

## Scenario: Defer – PPT last in Plan D – (withdrawn)

- Return to Superior Court after 3-year break:
  - Enter New Plan – PEPRA. May redeposit/restore to prior contributory plan. Former Plan E credit is included upon contributory plan restoration.
- Return to other employer covered by LACERA within 6 months:
  - Enter New Plan – PEPRA. May redeposit/restore to prior contributory plan. Former Plan E credit is included upon contributory plan restoration.
- Return to other employer covered by LACERA after 6 months:
  - Enter New Plan – PEPRA. May redeposit former plan but will remain in PEPRA Plan G. Former Plan E credit is included upon contributory plan restoration.

# Return to Service

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## Scenario: Withdraw Funds (Contributory Plans).

- Return to Superior Court after 3-year break:
  - Enter new plan – PEPRA. May redeposit/restore to prior plan with new entry age.
- Return to other employer covered by LACERA within 6 months:
  - Enter new plan – PEPRA. May redeposit/restore to prior plan with new entry age.
- Return to other employer covered by LACERA after 6 months:
  - Enter new plan – PEPRA. May redeposit former plan but will remain in PEPRA Plan as double-account.

# Key Contacts

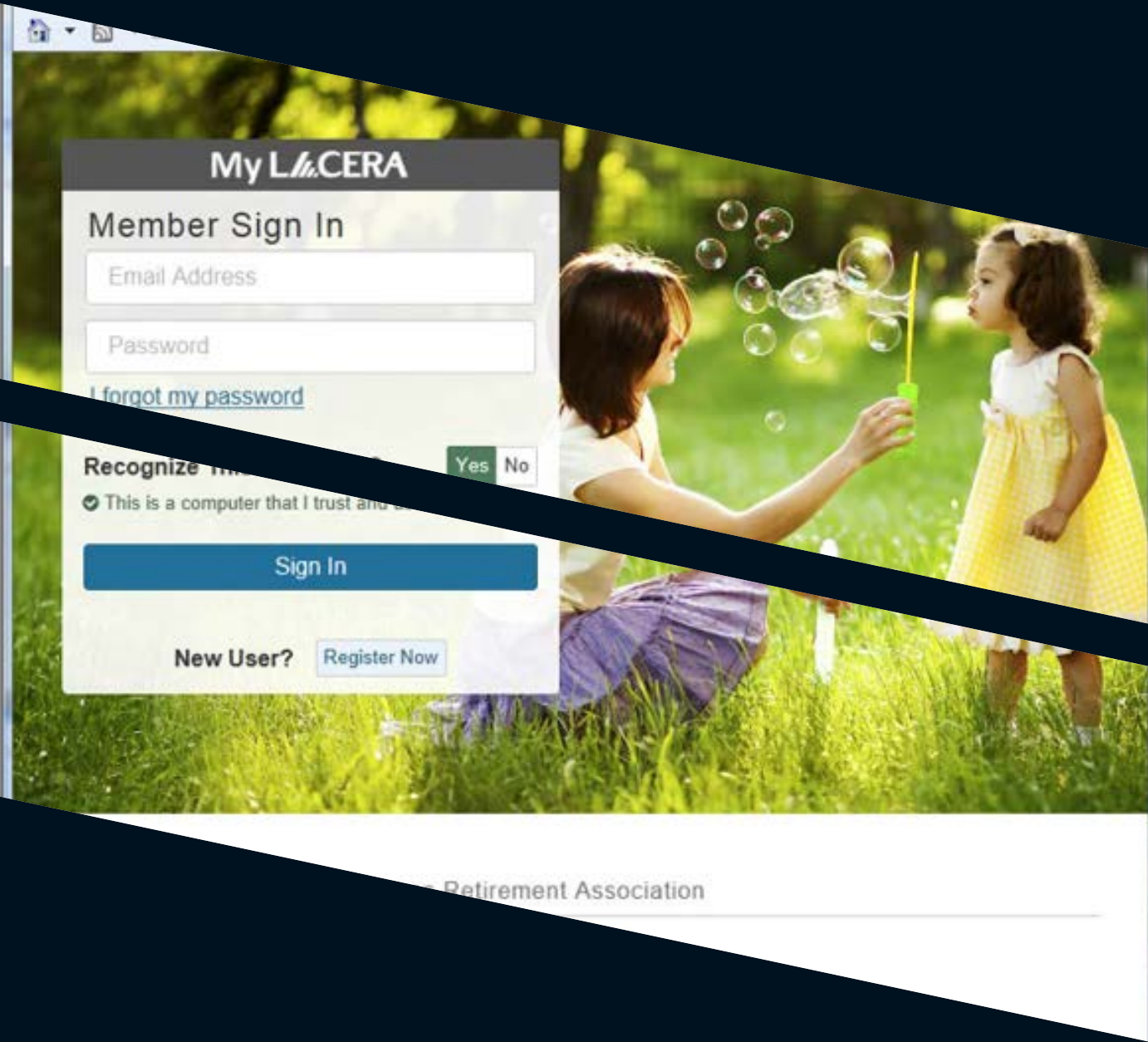
For questions regarding VSIP:

- email: [AskHR@lacourt.org](mailto:AskHR@lacourt.org)

For questions regarding Horizons 457(b) or Savings401(k) related to VSIP:

- Call Empower: 800-947-0845





# Stay Connected

LACERA's website:  
[www.lacera.com](http://www.lacera.com)

- Register on myLACERA
- Access your personal retirement information
- Calculate your retirement
- Update your email
- Send confidential emails through the Secure Message center
- Upload documents
- And much more!



# How Do I Contact LACERA?

By phone: **1-800-786-6464**

In Person: 300 N. Lake Ave. Pasadena, CA 91101  
(Temporarily Suspended Due To COVID-19)

By email: [welcome@lacera.com](mailto:welcome@lacera.com)

Online: [www.lacera.com](http://www.lacera.com)

**MyLACERA: Secure Message Center**

# Durable Power of Attorney

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- Allows trusted individual to act in your place
- No need to obtain court ordered conservatorship
- Stops upon death





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**THANK  
YOU!**

# Striving for Excellence in Service

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: **October 2020**



**Outreach Attendance**  
**1,641**  
6,707 Year-to-Date



**Outreach Events**  
**18**  
51 Year-to-Date



**Outreach Satisfaction**  
**N/A**  
Change Since Last Mo

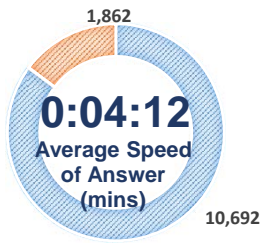
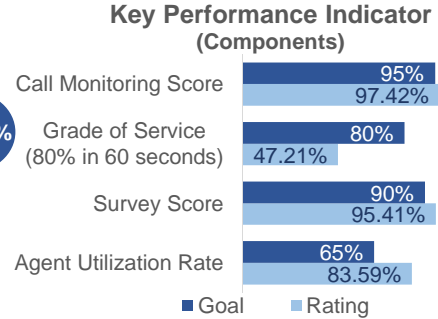
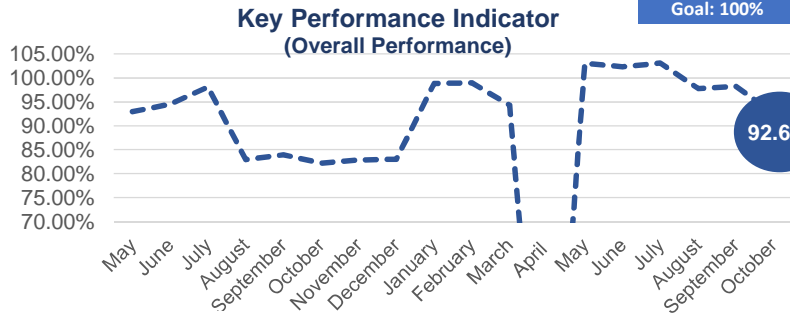


**Member Service Center**  
**N/A**  
- Change Since Last Mo



**Member Services Calls**  
**12,554**  
11,981 3 Mo. Avg.

## Member Services



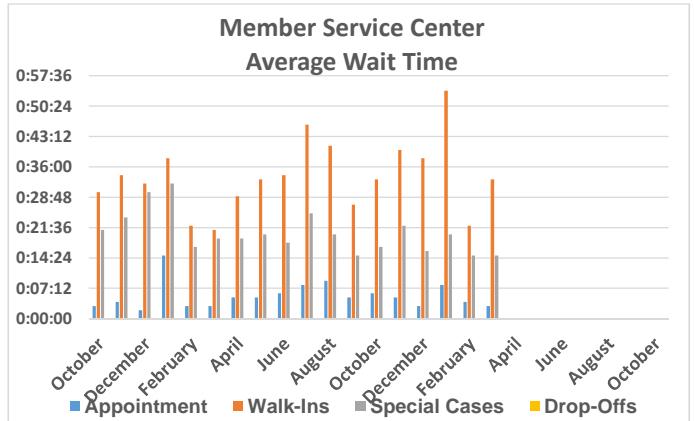
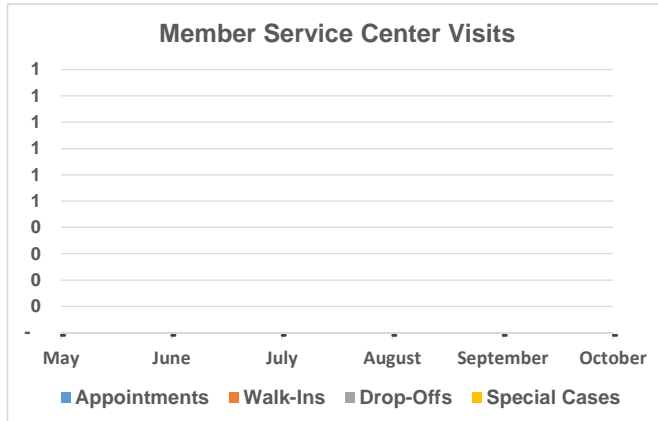
### Top Calls

1. Retirement Counseling: Process Overview
2. Retirement Counseling: Estimate
3. MyLACERA Portal Login Issues

**Emails 481**  
24:00 hours  
Avg. Response Time (ART)



**Secure Messages 701**

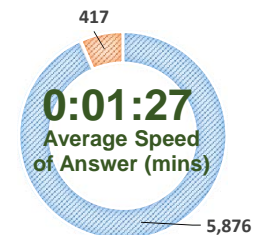


\*Drop Off Wait Time: No Waiting



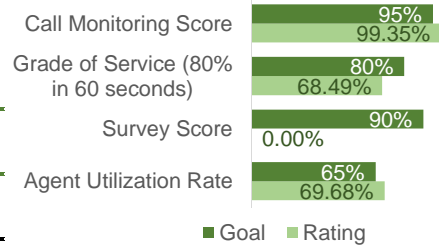
Total RHC Calls: **6,293**

## Retiree Healthcare



### Top Calls

1. Medical-New Enrollment/Change/Cancel
2. Medical Benefits
3. Medicare Part B Reimbursement



**Emails 310**  
1 Day  
Avg. Response Time (ART)



**Secure Messages 125**



## Striving for Excellence in Service (Continued)

Disability

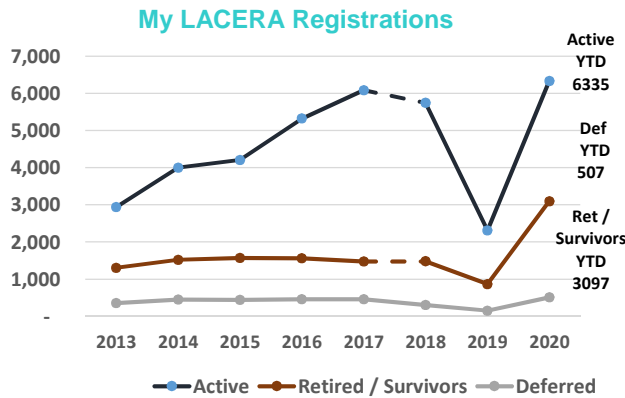
### Applications

<b>665</b>	666 Pending on: 9/30/2020
<b>In Process</b>	48 Received
<b>As Of:</b>	196 Year-to-Date
<b>10/31/2020</b>	0 Re-Opened
	0 Year-to-Date
	49 To Board - Initial
	167 Year-to-Date
	0 Closed
	7 Year-to-Date

### Appeals

<b>94</b>	94 Pending on: 9/30/2020
<b>In Process</b>	1 Received
<b>As Of:</b>	5 Year-to-Date
<b>10/31/2020</b>	0 Admin Closed/Rule 32
	6 Year-to-Date
	1 Referee Recommended
	3 Year-to-Date
	0 Revised/Reconsidered for Granting
	1 Year-to-Date

My LACERA

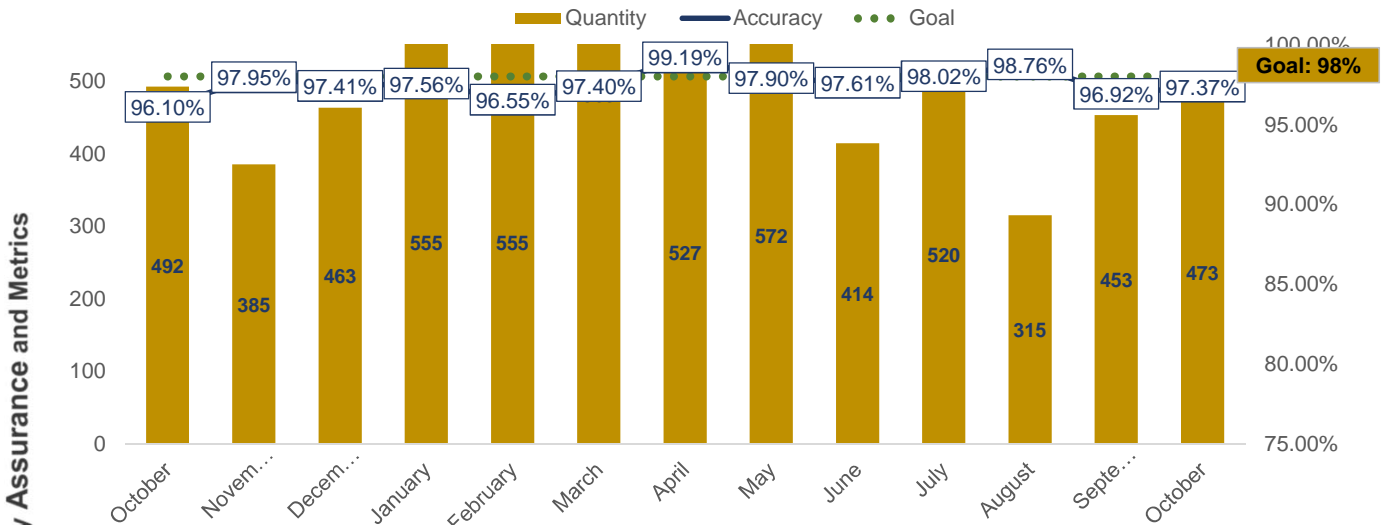


**COVID-19 NOTE**

Some Member Services, Retiree Healthcare, and Quality Assurance statistics became unavailable for a short time beginning in April 2020 due to COVID-19 impacts. Most of the data contained herein is up to date and based on current production both virtually and in the office. However, some data points such as surveys are based on six month average for survey scores prior to the pandemic.

## Striving for Excellence in Quality

### Audits of Retirement Elections, Payment Contracts, and Data Entry Completed by QA



\*Data for April 2020 is incomplete due to COVID-19 challenges. This is an estimated accuracy %

**October**



**97.37%**

#### Retirement Elections

**216** Samples  
97.09% Accuracy

#### Payment Contracts

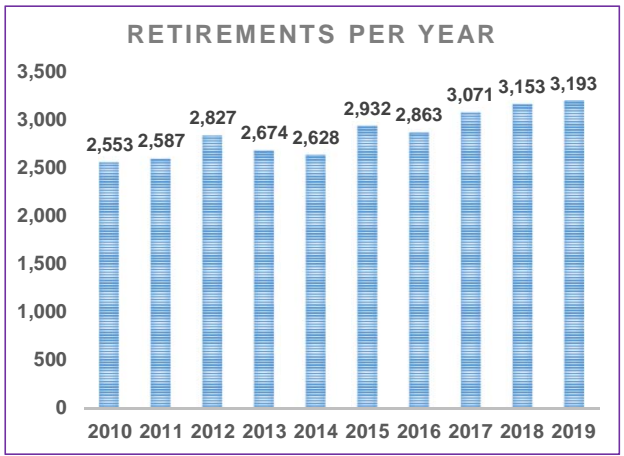
**197** Samples  
95.71% Accuracy

#### Data Entry

**60** Samples  
99.32% Accuracy

## Member Snapshot

		Members as of 11/16/2020				
		Plan	Active	Retired	Survivors	Total
General	Plan A		87	15,586	4,353	20,026
	Plan B		20	677	70	767
	Plan C		30	424	68	522
	Plan D		39,561	17,250	1,601	58,412
	Plan E		16,026	13,809	1,318	31,153
	Plan G		31,282	70	6	31,358
	<b>Total General</b>		<b>87,006</b>	<b>47,816</b>	<b>7,416</b>	<b>142,238</b>
Safety	Plan A		2	4,985	1,621	6,608
	Plan B		9,085	6,502	321	15,908
	Plan C		4,319	11	0	4,330
	<b>Total Safety</b>		<b>13,406</b>	<b>11,498</b>	<b>1,942</b>	<b>26,846</b>
<b>TOTAL MEMBERS</b>			<b>100,412</b>	<b>59,314</b>	<b>9,358</b>	<b>169,084</b>
<b>% by Category</b>			<b>59%</b>	<b>35%</b>	<b>6%</b>	<b>100%</b>



### Average Monthly Benefit Allowance Distribution November 2020

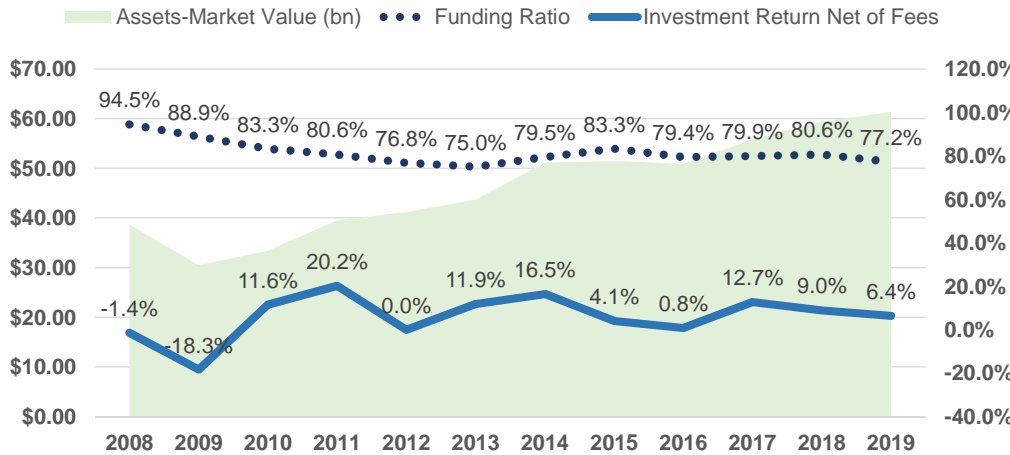
	General	Safety	Total	%
\$0 to \$3,999	29,905	1,842	31,747	53.81%
\$4,000 to \$7,999	12,942	3,498	16,440	27.86%
\$8,000 to \$11,999	3,379	4,162	7,541	12.78%
\$12,000 to \$15,999	933	1,521	2,454	4.16%
\$16,000 to \$19,999	295	276	571	0.97%
\$20,000 to \$23,999	82	107	189	0.32%
\$24,000 to \$27,999	27	18	45	0.08%
> \$28,000	12	3	15	0.03%
<b>Totals</b>	<b>47,575</b>	<b>11,427</b>	<b>59,002</b>	<b>100%</b>

**Average Monthly Benefit Allowance: \$ 4,465.00**

Healthcare Program		Healthcare Enrollments	
(YTD as of 10/31/20)		(Mo. Ending: 10/31/20)	
	Employer	Member	
Medical	190.1	14.9	Medical 52,356
Dental	15.1	1.5	Dental 53,731
Part B	24.8	0	Part B 36,655
LTC			LTC 600
<b>Total</b>	<b>230</b>	<b>16.4</b>	<b>Total 143,342</b>

## Key Financial Metrics

Fiscal Year End Financial Update (as of 06/30/2019)



### Funding Metrics (as of 6/30/19)

Employer NC	10.86%
UAAL	13.92%
Assumed Rate	7.00%
Star Reserve	\$614m
Total Assets	\$58.3b

### Contributions (as of 6/30/19)

	Employer	Member
Annual Add	\$1.7b	\$635.4m
% of Payroll	22.59%	7.68%

### TOTAL FUND RETURN (Net of Fees)

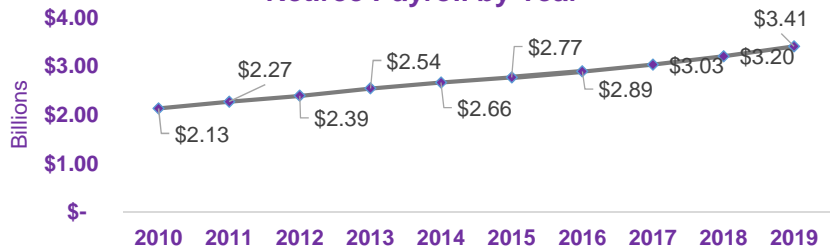
5 YR:	6.5%
10 YR:	9.1%

### Retired Members Payroll

(As of 10/31/2020)

Monthly Payroll	\$316.33m
Payroll YTD	\$1.3b
New Retired Payees Added	337
Seamless %	97.03%
New Seamless Payees Added	1,211
Seamless YTD	95.87%
By Check %	2.00%
By Direct Deposit %	98.00%

### Retiree Payroll by Year



Date	Conference
<b>December, 2020</b>	
8-10	IFEBC (International Foundation of Employment Benefit Plans) Public Employee Benefits Institute Virtual
<b><i>DUE TO COVID-19, SCHEDULED EVENTS FOR 2021 ARE SUBJECT TO CHANGE</i></b>	
<b>February, 2021</b>	
2-3	NCPERS FALL (Financial, Actuarial, Legislative & Legal) Conference Virtual
16-18	Pacific Pension Institute (PPI) North American Winter Roundtable Virtual
<b>March, 2021</b>	
8-9	CALAPRS (California Association of Public Retirement Systems) General Assembly Meeting Virtual
8-10	Council of Institutional Investors (CII) Spring Conference Washington D.C.
25-26	PREA (Pension Real Estate Association) Spring Conference TBD
<b>April, 2021</b>	
11-14	World Healthcare Congress Washington D.C.
<b>May, 2021</b>	
11-14	SACRS Spring Conference Long Beach, CA
23-26	NCPERS (National Conference on Public Employee Retirement Systems) Annual Conference Denver, CO <b><i>IN-PERSON EVENT CANCELLED</i></b>
<b>June, 2021</b>	
14-18	Investment Strategies & Portfolio Management ( <i>prev. Pension Fund &amp; Investment Mgmt.</i> ) Wharton School, University of Pennsylvania
<b>July, 2021</b>	
12-14	ICGN (International Corporate Governance Network) Annual Conference Toronto, Canada
14-16	Pacific Pension Institute (PPI) North American Summer Roundtable Vancouver, BC Canada
<b>September, 2021</b>	
22-24	Council of Institutional Investors (CII) Fall Conference Chicago, IL



November 23, 2020

**TO:** Trustees, Board of Retirement

**FOR:** Board of Retirement Meeting on December 2, 2020

**SUBJECT:** Ratification of Service Retirement and Survivor Benefit Application Approvals

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The attached report reflects service retirements and survivor benefit applications received as of the date of this memo, along with any retirement rescissions and/or changes approved at last month's Board meeting. Any retirement rescissions or changes received after the date of this memo up to the date of the Board's approval, will be reflected in next month's report.

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RUDOLPH A. APODACA	SHERIFF Dept.#SH	02-25-2021	26 YRS 04 MOS
BRUCE A. CANTLEY	SHERIFF Dept.#SH	11-30-2020	35 YRS 03 MOS
SANDRA A. CAPPS	SHERIFF Dept.#SH	10-31-2020	31 YRS 02½ MOS
RODNEY S. EINFALT	L A COUNTY FIRE DEPT Dept.#FR	11-29-2020	31 YRS 05 MOS
KATHLEEN L. GALLAGHER	SHERIFF Dept.#SH	11-28-2020	33 YRS 06 MOS
MARIO L. GONZALES	L A COUNTY FIRE DEPT Dept.#FR	12-19-2020	26 YRS 07 MOS
DAVID R. GUNNER	SHERIFF Dept.#SH	12-07-2020	34 YRS 08½ MOS
ISAAC U. HILL	SHERIFF Dept.#SH	11-27-2020	23 YRS 00 MOS
GLENN J. LAUB	L A COUNTY FIRE DEPT Dept.#FR	11-28-2020	37 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JOHN W. MCCLURE	SHERIFF Dept.#SH	12-01-2020	31 YRS 03½ MOS
LEONARD MCCRAY	SHERIFF Dept.#SH	12-31-2020	31 YRS 10 MOS
JAVIER PENA	SHERIFF Dept.#SH	11-06-2020	30 YRS 04½ MOS
STEVEN STRANGE	SHERIFF Dept.#SH	12-31-2020	37 YRS 04½ MOS
PATRICK A. UNKLE	SHERIFF Dept.#SH	01-30-2021	38 YRS 01 MOS
EDGAR F. VEGA	L A COUNTY FIRE DEPT Dept.#FR	11-28-2020	31 YRS 09½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JANICE ADAMS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	15 YRS 04½ MOS
MARIA DALISA D. AGUSTIN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	22 YRS 02½ MOS
GUSTAVO S. AHUMADA	PUBLIC WORKS Dept.#PW	12-31-2020	41 YRS 07 MOS
CRISTINA ALEGRE	PUBLIC DEFENDER Dept.#PD	12-31-2020	36 YRS 01 MOS
FERNANDO ALVAREZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-10-2020	30 YRS 07½ MOS
EUN HI AN	PUBLIC HEALTH PROGRAM Dept.#PH	01-30-2021	19 YRS 00 MOS
FRANCESCA M. ANELLO	CORRECTIONAL HEALTH Dept.#HC	12-28-2020	13 YRS 09½ MOS
SHARON F. ARNWINE	HEALTH SERVICES ADMINISTRATION Dept.#HS	11-13-2020	40 YRS 09 MOS
DALJIT S. ARORA	AMBULATORY CARE NETWORK Dept.#HN	11-28-2020	20 YRS 08½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANNA AVETISYAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-13-2020	17 YRS 01½ MOS
CHRISTINE AVILA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	35 YRS 03 MOS
ARAKSI AYTAYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	29 YRS 02½ MOS
SEDIK AYVAZI	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	30 YRS 01½ MOS
ANAHID BANDIKIAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	12 YRS 02½ MOS
AURELIO BARCO	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-31-2020	32 YRS 08½ MOS
JOCELYN R. BARNUM	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-31-2020	33 YRS 01½ MOS
MONET S. BARRIOS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	10-31-2020	33 YRS 07½ MOS
ALMA V. BASALDUA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-28-2020	31 YRS 03 MOS



# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
GRICELDA BECERRA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-01-2020	28 YRS 11½ MOS
FRANCES M. BELL	MENTAL HEALTH Dept.#MH	10-23-2020	18 YRS 07 MOS
CARMEN A. BELLAS-LOFFR	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-31-2020	22 YRS 01½ MOS
JULIA J. BERNARDEZ	AMBULATORY CARE NETWORK Dept.#HN	12-31-2020	26 YRS 10½ MOS
LONNIE V. BIVENS	MEDICAL EXAMINER-CORONER Dept.#ME	01-01-2021	22 YRS ½ MOS
LOURDES L. BLANCO	MENTAL HEALTH Dept.#MH	12-31-2020	29 YRS 05 MOS
MONICA BOEN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	01-30-2021	22 YRS 00 MOS
PAMELA BOOTH	DISTRICT ATTORNEY Dept.#DA	11-30-2020	35 YRS 06 MOS
LEO B. BRUSSEL	COUNTY COUNSEL Dept.#CC	11-30-2020	19 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
VICKI BUNTON	DISTRICT ATTORNEY Dept.#DA	12-31-2020	35 YRS 09½ MOS
SYLVIA BUSTOS	SHERIFF Dept.#SH	12-31-2020	41 YRS 07½ MOS
NADIA BYBEE	PUBLIC HEALTH PROGRAM Dept.#PH	12-28-2020	12 YRS 07 MOS
DAVID CACIC	PARKS AND RECREATION Dept.#PK	12-31-2020	12 YRS 09½ MOS
TINA CALLOWAY	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	22 YRS 03 MOS
DELIA CASAREZ	HEALTH SERVICES ADMINISTRATION Dept.#HS	12-31-2020	24 YRS ½ MOS
LETICIA CEJA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	30 YRS 06½ MOS
AVETIK CHAKRYAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	17 YRS ½ MOS
IRENE V. CHAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	41 YRS 07½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARIA S. CHAVEZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	13 YRS 11½ MOS
MARY CHAVEZ	SHERIFF Dept.#SH	10-31-2020	36 YRS 07½ MOS
FRANCES B. CHEAVES	TREASURER AND TAX COLLECTOR Dept.#TT	01-31-2021	33 YRS 05½ MOS
MARCELLA CHILDRESS	SHERIFF Dept.#SH	11-30-2020	32 YRS 00 MOS
MUN K. CHIN	AMBULATORY CARE NETWORK Dept.#HN	12-31-2020	18 YRS 06 MOS
CHUNGJA K. CHO	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-31-2020	13 YRS 07 MOS
THERESE K. CLAUSSEN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	01-30-2021	39 YRS 07 MOS
VALERY G. COLEMAN	CHILDREN & FAMILY SERVICES Dept.#CH	11-23-2020	15 YRS 03½ MOS
DONALD D. COLLINS	CHILDREN & FAMILY SERVICES Dept.#CH	10-31-2020	38 YRS 02 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARIA I. COSME	AMBULATORY CARE NETWORK Dept.#HN	12-31-2020	20 YRS 06½ MOS
JOAN V. CREAM	BOARD OF SUPERVISORS Dept.#BS	12-05-2020	11 YRS 11½ MOS
FLORDELIS G. CRUZ	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-28-2020	28 YRS 11 MOS
IRENE CULVER	PUBLIC HEALTH PROGRAM Dept.#PH	11-03-2020	23 YRS 04½ MOS
CAROL DALRYMPLE	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	30 YRS 11½ MOS
ASHOT A. DASHTOIAN	CHILDREN & FAMILY SERVICES Dept.#CH	12-01-2020	26 YRS 02½ MOS
GLADYS A. DATSOMOR	JUVENILE COURT HEALTH SERVICES Dept.#HJ	11-28-2020	18 YRS 07 MOS
SON V. DINH	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-26-2020	21 YRS 01½ MOS
DIKRAN R. DJERRAHIAN	MENTAL HEALTH Dept.#MH	11-04-2020	19 YRS 01½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARGARET DURAN	CHILDREN & FAMILY SERVICES Dept.#CH	12-31-2020	29 YRS 02½ MOS
KATHERINE L. EASLEY-COKER	TREASURER AND TAX COLLECTOR Dept.#TT	11-16-2020	42 YRS 02 MOS
WYATT V. EDMOND	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	09-12-2020	25 YRS 02½ MOS
ELIZABETH K. EDWARDS	CHILDREN & FAMILY SERVICES Dept.#CH	09-29-2020	26 YRS 11 MOS
DONALD EISMAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-01-2020	21 YRS 01½ MOS
RASHEEDAH EL AMIN	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-31-2020	18 YRS ½ MOS
DARYLL V. ELLIS	PROBATION DEPARTMENT Dept.#PB	11-30-2020	33 YRS 08 MOS
ALFRED ENG	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-28-2020	37 YRS 00 MOS
MANUEL ESPARZA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-09-2020	39 YRS ½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ROSEANNA ESPINOZA	JUVENILE COURT HEALTH SERVICES Dept.#HJ	10-31-2020	26 YRS 10½ MOS
JOSEPH P. ESPOSITO	DISTRICT ATTORNEY Dept.#DA	12-05-2020	31 YRS 05½ MOS
VIOLETA ESQUILIN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-04-2020	33 YRS 05½ MOS
NELLY A. FAGGIOLLY	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-31-2020	31 YRS ½ MOS
EMMA M. FERRA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	42 YRS 02½ MOS
GLORIA FLORES	CHILDREN & FAMILY SERVICES Dept.#CH	11-10-2020	27 YRS 06½ MOS
GORDON FRASER	AMBULATORY CARE NETWORK Dept.#HN	11-30-2020	25 YRS 07 MOS
CLARA E. FRIERSON	MENTAL HEALTH Dept.#MH	12-31-2020	29 YRS 09 MOS
JEAN V. FRUTO	AMBULATORY CARE NETWORK Dept.#HN	01-20-2021	22 YRS 06 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JANICE GABEL	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	11-28-2020	33 YRS 05 MOS
LOTTIE GARY	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-28-2020	26 YRS 09½ MOS
DEJENE GASHE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	25 YRS 09½ MOS
SHOBHA GAUTAM	MENTAL HEALTH Dept.#MH	11-09-2020	32 YRS 08½ MOS
JACKIE A. GENTRY	PUBLIC WORKS Dept.#PW	10-09-2020	29 YRS 04½ MOS
GWENDOLYN GENTRY	ANIMAL CONTROL Dept.#AN	11-07-2020	19 YRS 04½ MOS
STEPHEN R. GILMORE	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	23 YRS 06½ MOS
JON M. GOLDBERG	TREASURER AND TAX COLLECTOR Dept.#TT	12-01-2020	32 YRS 07½ MOS
SERGIO A. GONZALEZ	DISTRICT ATTORNEY Dept.#DA	12-31-2020	32 YRS 08½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
FRANKIE GRESHAM	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	01-30-2021	32 YRS 05 MOS
MARVIN T. GROSS	PUBLIC DEFENDER Dept.#PD	12-31-2020	25 YRS ½ MOS
ARMIDA M. GUTIERREZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	25 YRS 11½ MOS
JANET I. GUZMAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	01-31-2021	26 YRS 10½ MOS
MELANIE W. HAREWOOD	MENTAL HEALTH Dept.#MH	11-30-2020	15 YRS 07 MOS
MARICARMEN HERNANDEZ	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	12-31-2020	12 YRS 05 MOS
KATHRYN D. HINES	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	36 YRS 09 MOS
CHRISTINE I. HSU	CHILDREN & FAMILY SERVICES Dept.#CH	12-31-2020	20 YRS ½ MOS
STEPHANIE HUNT	CHILDREN & FAMILY SERVICES Dept.#CH	10-30-2020	11 YRS 09 MOS



# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CATHELYN HUNTER	BOARD OF SUPERVISORS Dept.#BS	12-31-2020	41 YRS 06½ MOS
SHU-YA C. HWANG	PUBLIC HEALTH PROGRAM Dept.#PH	01-31-2021	13 YRS 03 MOS
STEPHEN J. ISAGO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	29 YRS 03½ MOS
NEMA I. JADORMIO	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	12-31-2020	21 YRS 10½ MOS
NORMA J. JILES	CHILD SUPPORT SERVICES Dept.#CD	12-31-2020	32 YRS 07½ MOS
HELLEN R. JOHNSON	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-31-2020	46 YRS 03½ MOS
SHIRLISA JOHNSON	AMBULATORY CARE NETWORK Dept.#HN	12-31-2020	36 YRS 05 MOS
RHONDA I. JONES	CHILD SUPPORT SERVICES Dept.#CD	01-30-2021	27 YRS 01 MOS
MARY JONES	BOARD OF SUPERVISORS Dept.#BS	12-05-2020	11 YRS 11½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ORSAN JORDAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	01-31-2021	21 YRS 04½ MOS
LINDA C. KAPPELER	COUNTY COUNSEL Dept.#CC	12-31-2020	33 YRS 08 MOS
SONIA KHALATIAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	14 YRS 05½ MOS
BELLA KWONG	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-07-2020	40 YRS 01½ MOS
DIANE LAMB	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-31-2020	27 YRS 04½ MOS
LEONOR LAO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	12-26-2020	20 YRS 00 MOS
ELLNOR R. LASKEY	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	39 YRS 01 MOS
ROWENA V. LAYUG	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	10-01-2020	17 YRS 09 MOS
MAIHOANG T. LE	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-08-2020	40 YRS ½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
IRENE K. LEE	PUBLIC HEALTH PROGRAM Dept.#PH	12-31-2020	33 YRS 02½ MOS
LORENA A. LEIVA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	11-28-2020	21 YRS 08 MOS
YING LI	PROBATION DEPARTMENT Dept.#PB	10-16-2020	18 YRS 10½ MOS
MONREENA A. LINEBARGER	SHERIFF Dept.#SH	10-30-2020	07 YRS 05½ MOS
JACQUELINE L. LOWE-WOODSON	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-03-2020	25 YRS 02½ MOS
MARIA A. MARINO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-26-2020	33 YRS 05½ MOS
MICHAEL J. MARTINEZ	PARKS AND RECREATION Dept.#PK	12-08-2020	14 YRS ½ MOS
ROD D. MC GUFFEE	INTERNAL SERVICES Dept.#IS	11-20-2020	34 YRS 09 MOS
ELEANOR F. MCCARTAN	SHERIFF Dept.#SH	01-25-2021	20 YRS 04 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SHEARRON D. MCKENZIE	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-30-2020	35 YRS 06 MOS
DELIA C. MCKINNEY	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	11-30-2020	36 YRS 07 MOS
THERESA MCMAHON	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	12-31-2020	12 YRS 09½ MOS
JUDITH C. MIRANDA	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-30-2020	29 YRS 06 MOS
LORRAINE MITCHELL	INTERNAL SERVICES Dept.#IS	11-28-2020	44 YRS 00 MOS
KATHRYNE L. MOMENTS	HEALTH SERVICES ADMINISTRATION Dept.#HS	12-31-2020	34 YRS 01 MOS
GABRIELA MONARREZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-28-2020	40 YRS 01 MOS
ADELA MORALES	PUBLIC HEALTH PROGRAM Dept.#PH	11-28-2020	42 YRS 01 MOS
GAYLE A. MOREHOUSE	SHERIFF Dept.#SH	12-31-2020	21 YRS 08½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DENISE T. MOTOYASU	SHERIFF Dept.#SH	12-31-2020	31 YRS 03 MOS
SURANGANI D. MUDALIGE	SHERIFF Dept.#SH	12-26-2020	30 YRS 01 MOS
MARY MURILLO	PROBATION DEPARTMENT Dept.#PB	11-10-2020	30 YRS 03 MOS
TERESITA O. ONG	SHERIFF Dept.#SH	12-31-2020	33 YRS 10½ MOS
ADEBOYE S. OSENI	PUBLIC HEALTH PROGRAM Dept.#PH	11-16-2020	20 YRS 06 MOS
SYLVIA OSORNIA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	11-28-2020	27 YRS 04 MOS
ELIZABETH L. PEREZ	SHERIFF Dept.#SH	11-28-2020	41 YRS 05 MOS
PAMELA PERRY	MENTAL HEALTH Dept.#MH	10-31-2020	30 YRS 03½ MOS
MICHAEL A. PISTONE	ARTS AND CULTURE Dept.#RT	11-18-2020	19 YRS 08 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CARDAIL PLENTY	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-28-2020	30 YRS 08 MOS
LUIS A. PONCE	MENTAL HEALTH Dept.#MH	12-26-2020	25 YRS 10 MOS
LAVERNE POTTS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	40 YRS 01 MOS
ELVIRA B. PRIETO	PUBLIC HEALTH PROGRAM Dept.#PH	12-31-2020	27 YRS 01 MOS
MARINA PROVENCIO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	43 YRS 00 MOS
FRANCES A. QUARY	CHILD SUPPORT SERVICES Dept.#CD	11-28-2020	46 YRS 03 MOS
DANILO QUIJANO	MENTAL HEALTH Dept.#MH	10-30-2020	29 YRS 02 MOS
CARLOS J. REYES	PUBLIC HEALTH PROGRAM Dept.#PH	10-31-2020	33 YRS 05½ MOS
MARILYN J. RHABURN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-27-2020	32 YRS 11 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARK RIDLEY-THOMA	BOARD OF SUPERVISORS Dept.#BS	12-08-2020	18 YRS 04½ MOS
DAVID ROBINSON	PUBLIC HEALTH PROGRAM Dept.#PH	12-31-2020	31 YRS 11½ MOS
SUSAN ROBLEDO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-30-2020	12 YRS 05 MOS
SUSANA A. ROBLES	AUDITOR - CONTROLLER Dept.#AU	12-31-2020	43 YRS 05½ MOS
KIM K. ROSARIO	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	12-31-2020	07 YRS 10½ MOS
DANA S. RYAN	CHILDREN & FAMILY SERVICES Dept.#CH	01-30-2021	20 YRS 01 MOS
CHRISTINA SANDBERG	MENTAL HEALTH Dept.#MH	10-19-2020	45 YRS 05 MOS
HERMIK SARKISSIAN	PROBATION DEPARTMENT Dept.#PB	01-30-2021	18 YRS 00 MOS
GARY L. SCHAFER JR	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-16-2020	28 YRS 11 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
LINDA J. SHEPPHERD	AMBULATORY CARE NETWORK Dept.#HN	11-30-2020	40 YRS 01 MOS
SYLVIA S. SLIVCHAK	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	01-31-2021	29 YRS 04½ MOS
JACQUELINE SMITH	PUBLIC HEALTH PROGRAM Dept.#PH	12-30-2020	38 YRS 02 MOS
NARDA L. SNEDECOR	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-20-2020	35 YRS 00 MOS
RONNA M. STONEBRAKER	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-31-2020	20 YRS 04½ MOS
NANCY SUMIDA	PUBLIC DEFENDER Dept.#PD	01-04-2021	30 YRS 08½ MOS
VICTORIA SUN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-28-2020	20 YRS 02 MOS
FRANK H. SWAIN	PROBATION DEPARTMENT Dept.#PB	11-08-2020	32 YRS 07½ MOS
TONG T. TAN	AMBULATORY CARE NETWORK Dept.#HN	12-02-2020	24 YRS ½ MOS



# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SOK H. TAY	PARKS AND RECREATION Dept.#PK	01-01-2021	14 YRS 10½ MOS
TOM T. TRAN	SUPERIOR COURT/COUNTY CLERK Dept.#SC	10-31-2020	32 YRS 10 MOS
HAI TRAN	INTERNAL SERVICES Dept.#IS	11-30-2020	38 YRS 09 MOS
ALADDINCHKEA TUNGMEAS	MENTAL HEALTH Dept.#MH	12-31-2020	11 YRS 10 MOS
SIPHAN VAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	01-31-2021	36 YRS 01½ MOS
CATALINA VAUGHN	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	12-31-2020	26 YRS 03½ MOS
REBECCA J. VELASQUEZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	46 YRS 06½ MOS
LANG M. VUONG	LACERA Dept.#NL	11-18-2020	35 YRS 01 MOS
PATRICIA WAGONER-DAVI	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-28-2020	29 YRS 09 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHAEL A. WARD	PROBATION DEPARTMENT Dept.#PB	11-13-2020	40 YRS 08½ MOS
RHONDA WHITE-WATTS	COUNTY COUNSEL Dept.#CC	12-17-2020	18 YRS 06 MOS
VALERIE C. WIGGAN	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	10-31-2020	31 YRS 10½ MOS
MABEL T. WONG	PUBLIC HEALTH PROGRAM Dept.#PH	01-30-2021	32 YRS 00 MOS
THOMAS G. WRIGHT	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	10-08-2020	51 YRS 08 MOS
ALEXANDER YAMZON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-14-2020	14 YRS 03½ MOS
KENNETH J. YELVERTON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-28-2020	40 YRS 04 MOS
VIRGILIO M. ZABALA	PUBLIC HEALTH PROGRAM Dept.#PH	12-31-2020	24 YRS ½ MOS
CYNTHIA A. ZEPEDA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-02-2020	39 YRS ½ MOS

**BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020**

**BENEFIT APPROVAL LIST**

**GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
GINA A. ZUCCO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-06-2020	28 YRS 11½ MOS

**BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020**

**BENEFIT APPROVAL LIST**

**SAFETY SURVIVOR APPLICATIONS**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RACHEL A. BARBOSA	SHERIFF Dept.#SH	08-10-2019	29 YRS 08½ MOS
WIFE of ERNIE BARBOSA dec'd on 08-09-2019, Sect. #31781.3			
HYEONGJIN PARK	SHERIFF Dept.#SH	08-22-2020	07 YRS 11 MOS
WIFE of SOO H KIM dec'd on 08-21-2020, Sect. #31781.3			

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ROLANDO T. BANSON	AMBULATORY CARE NETWORK Dept.#HN	06-28-2020	11 YRS 11 MOS
SPOUSE of MARIA TERESA BANSON dec'd on 06-27-2020, Sect. #31781.1			
SUSANNA GIN	REG-RECORDER/COUNTY CLERK Dept.#RR	09-12-2020	12 YRS 06½ MOS
SPOUSE of TIMMY D DANG dec'd on 09-11-2020, Sect. #31781.3			
BENJAMIN MUNOZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-27-2020	13 YRS 09 MOS
SPOUSE of LESLIE M MUNOZ dec'd on 07-26-2020, Sect. #31781.3			
BEATRICE O. SHEDRACK	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	03-16-2020	11 YRS 07½ MOS
WIFE of YOUNG N SHEDRACK dec'd on 03-15-2020, Sect. #31781.1			

**BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020**

**BENEFIT APPROVAL LIST**

**SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED**

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SCOTT C. BARKER	SHERIFF Dept.#SH	11-01-2020	08 YRS 11 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ROMEO B. ADRIANO	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-12-2020	06 YRS 01 MOS
ABHAI S. BHATIA	SHERIFF Dept.#SH	12-05-2020	09 YRS 06 MOS
KEITH S. CAMPEAU	SHERIFF Dept.#SH	11-17-2020	08 YRS 01 MOS
MARIA CANCINO	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-15-2020	18 YRS 07 MOS
JAAFAR CHIKH ISMAIL	MENTAL HEALTH Dept.#MH	11-05-2020	11 YRS ½ MOS
FRANK W. CHRISTIAN	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	03-01-2017	20 YRS 08 MOS
CHRISTOPHER J. COSEGLIA	PROBATION DEPARTMENT Dept.#PB	10-06-2020	17 YRS 11 MOS
SHERI R. COWAN	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-30-2020	14 YRS 06 MOS
MARTHA R. DAVIS	PUBLIC HEALTH PROGRAM Dept.#PH	10-06-2020	16 YRS 05 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MELINDA DELGADO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	12-08-2020	31 YRS 05 MOS
KATHERINE DUARTE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-12-2020	25 YRS 10½ MOS
NELLIE FIERRO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-30-2020	10 YRS 04 MOS
CYNTHIA A. FLETES	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	11-01-2020	10 YRS 01 MOS
SUSAN GARNER	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	03-01-2019	20 YRS 02 MOS
ALMA D. HUDSON	CHILD SUPPORT SERVICES Dept.#CD	11-23-2020	44 YRS 09½ MOS
TAMMY D. JOHNSON	MENTAL HEALTH Dept.#MH	10-23-2020	11 YRS 00 MOS
HODA F. KADDIS	CALIFORNIA CHILDREN'S SERVICES Dept.#PS	11-13-2020	11 YRS 00 MOS
PHIL KEM	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-19-2020	25 YRS 04½ MOS



# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DONNA A. LA MOTHE	PROBATION DEPARTMENT Dept.#PB	11-02-2020	29 YRS 02 MOS
ROBIN F. LANDE-KANIZO	CALIFORNIA CHILDREN'S SERVICES Dept.#PS	11-06-2020	20 YRS ½ MOS
PAULA B. LENARSKY	DISTRICT ATTORNEY Dept.#DA	09-14-2020	14 YRS 10 MOS
JAMES E. LINDSEY	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	11-16-2020	20 YRS 02 MOS
KAREN K. LISSER	INTERNAL SERVICES Dept.#IS	12-14-2020	10 YRS 00 MOS
MIGUEL LOPEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	11-25-2020	23 YRS 03 MOS
LYDIA L. LUNA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	10-25-2020	05 YRS 07 MOS
GEORGIA E. MCCULLOUGH	SUPERIOR COURT/COUNTY CLERK Dept.#SC	10-29-2020	13 YRS 00 MOS
KATHRYN A. MCGRATH	PROBATION DEPARTMENT Dept.#PB	11-25-2020	29 YRS 01½ MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
EDWARD L. MICKENS	INTERNAL SERVICES Dept.#IS	03-01-2015	14 YRS 03 MOS
DONNA L. MOBLEY	MUSEUM OF ART Dept.#AR	03-01-2020	14 YRS 06 MOS
RALPH S. MONTANO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-03-2020	10 YRS 06 MOS
HENRIETTE M. NELSON	CHILDREN & FAMILY SERVICES Dept.#CH	12-31-2020	05 YRS 08 MOS
MARTHA O. OSBORNE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-18-2020	21 YRS 03½ MOS
ROGER T. PARTYKA	CHIEF INFORMATION OFFICE Dept.#IO	03-01-2016	15 YRS 05 MOS
ANDREA PORTER	PROBATION DEPARTMENT Dept.#PB	11-03-2020	24 YRS ½ MOS
RITA L. ROBINSON	PARKS AND RECREATION Dept.#PK	12-31-2020	07 YRS 01 MOS
CHERYL N. RUSSELL	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	10-31-2020	21 YRS 10 MOS

# BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ELKE M. SCHREINER	PUBLIC LIBRARY Dept.#PL	08-07-2020	04 YRS 03½ MOS
LESLIE M. STANITSAS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	11-30-2020	17 YRS 09 MOS
ALAN VANHOOK	INTERNAL SERVICES Dept.#IS	03-01-2018	15 YRS 02 MOS
BERNARD WILLIS	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	10-30-2020	11 YRS 11 MOS
DAVID L. WINTERS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	10-01-2020	07 YRS 05 MOS
PAULETTA WYNN	PUBLIC HEALTH PROGRAM Dept.#PH	03-01-2019	15 YRS 04 MOS
YIHCHANG YUAN	ASSESSOR Dept.#AS	11-21-2020	20 YRS 06 MOS


**BOARD OF RETIREMENT MEETING OF DECEMBER 2, 2020  
RESCISSIONS/CHANGES FROM BENEFIT APPROVAL LIST  
APPROVED ON NOVEMBER 7, 2020**

**GENERAL MEMBER APPLICATIONS FOR SERVICE RETIREMENT**

NAME	DEPARTMENT	UPDATE
CAMILLE J WILDER	COASTAL CLUSTER- HARBOR/UCLA MC	RESCINDED RETIREMENT
CYNTHIA M CHAVEZ	SUPERIOR COURT/COUNTY CLERK	RESCINDED RETIREMENT
NARVA L BLUE	SUPERIOR COURT/COUNTY CLERK	CHANGE OF DATE TO January 9, 2021
TSOTSO ODAMTTEN	WORKFORCE DEV AGING & COMM SVC	CHANGE OF DATE TO December 5, 2020

November 20, 2020

TO: Each Trustee  
Board of Retirement

FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: December 2, 2020 Board of Retirement Meeting

SUBJECT: **EXTENSION OF LEGISLATIVE ADVOCACY SERVICES CONTRACT**

## **RECOMMENDATION**

That the Board of Retirement authorize a one-year extension of the current contract—

1. With Ackler & Associates and McHugh, Koepke & Associates commencing on January 1, 2021 and ending on December 31, 2021 to provide state legislative advocacy services; and
2. With Williams & Jensen and Doucet Consulting Solutions commencing on February 1, 2021 and ending on January 31, 2022 to provide federal legislative advocacy services.

## **LEGAL AUTHORITY**

The Board of Retirement's (BOR) oversight of legislative affairs and legislative advocacy on pension, health, and plan administration issues is within the plenary authority and fiduciary of the BOR under Section 17 of Article XVI of the California Constitution to administer the plan, giving precedence to the interest of members and their beneficiaries. Board oversight concerning these legislative issues is consistent with the BOR's Legislative Policy and Engagement Policy. The BOR has the authority to select such vendors as are needed to assist in the performance of its duties.

## **BACKGROUND**

On November 9, 2017, the BOR approved Ackler & Associates and McHugh Koepke & Associates as LACERA's state legislative advocacy services providers. On December 14, 2017, the BOR approved Williams & Jensen and Doucet Consulting Solutions as LACERA's federal legislative advocacy services providers. The engagements were the result of Requests For Proposals (RFP) to support LACERA's legislative affairs in advocating LACERA's position and interests on state and federal legislation related to pension and retirement-related matters.

The contract for Ackler & Associates and McHugh Koepke & Associates will terminate on December 31, 2020 but may be extended for two additional one-year terms by LACERA. The contract for Williams & Jensen and Doucet Consulting Solutions will terminate on January 31, 2021 but may be extended for two additional one-year terms

by LACERA. Both contracts provide that the contract term may be terminated by LACERA with 30 days written notice or by the legislative advocates with 90 days written notice. No termination notice has been given by either LACERA or the legislative advocates.

## **DISCUSSION**

Staff has worked with the state and federal legislative advocates on a variety of engagements since contracting their services. The legislative advocates have advised and assisted with arranging meetings with legislators, aides, and committee staff to provide education on LACERA's history and function, foster relationships, and promote visibility. The recent November 3 election has resulted in changes to the legislative ranks, and LACERA would benefit from maintaining current relationships and establishing new ones with legislators and their staff.

The legislative advocates have also advised and advocated on positions support and opposition adopted by the BOR. At the federal level, the legislative advocates continue to advocate for the repeal of the Windfall Elimination Provision and Government Pension Offset and to monitor changes to tax laws and regulations that affect retirement security and benefits. At the state level, the legislative advocates have assisted LACERA in passing and defeating legislation for the County Employee Retirement Law of 1937, and LACERA currently has a pending proposal relating to a COVID-19 presumption for disability retirement.

Staff has maintained an effective working relationship with the legislative advocates and believes that they have provided quality service to LACERA. In accordance with recent discussions regarding LACERA's Education Policy to provide for more in-house board education through its consultants, staff will also work with the legislative advocates to provide for upcoming education sessions.

**IT IS THEREFORE RECOMMENDED THAT THE BOARD** authorize a one-year extension of the current contract —

1. With Ackler & Associates and McHugh, Koepke & Associates commencing on January 1, 2021 and ending on December 31, 2021 to provide state legislative advocacy services; and
2. With Williams & Jensen and Doucet Consulting Solutions commencing on February 1, 2021 and ending on January 31, 2022 to provide federal legislative advocacy services.

**Reviewed and Approved:**



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**Steven P. Rice, Chief Counsel**

cc: Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
John Harrington  
Cassandra Smith  
Tony Roda, Williams & Jensen  
Joe Ackler, Ackler & Associates



November 19, 2020

TO: Each Trustee,  
Board of Retirement

FROM: Carlos Barrios *CB*  
Interim Division Manager, Benefits

FOR: December 2, 2020 Board of Retirement Meeting

SUBJECT: **RATIFICATION OF RECIPROCAL DISABILITY RETIREMENTS**

IT IS RECOMMENDED that the Board approve the reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency for the performance of their duties and have met the burden of proof.

RECIPROCAL AGENCY	DEPARTMENT	NAME	SAFETY / GENERAL MEMBER	DISABILITY TYPE	RETIREMENT DATE
San Bernardino County Employee Retirement Association	Sheriff	Glenn G. Bonde	Safety	SCD	3/17/2018
San Bernardino County Employee Retirement Association	Sheriff	Jeffrey A. Ditsch	Safety	SCD	10/26/2019
CALPERS	Sheriff	Michael J. Ullerich	Safety	SCD	1/19/2020
CALPERS	Sheriff	Juan Chavez Jr	Safety	SCD	5/5/2020

BB:sp





November 19, 2020

TO: Each Trustee,  
Board of Retirement

FROM: Carlos Barrios *CB*  
Interim Benefits Division Manager

FOR: December 2, 2020 Board of Retirement Meeting

**SUBJECT: RETIREMENT DATE ADJUSTMENT FOR LENORE CUTLER TO CONFORM WITH INTERNAL REVENUE CODE (IRC) SECTION 401(A)(9)**

The Internal Revenue Code (IRC) Section 401(a)(9) requires that individual who leaves County service, defers their retirement, then reaches age 70.5, to begin taking a distribution from their LACERA retirement by April 1<sup>st</sup> of the year following the year in which they turn age 70.5. The age applies to individuals who turn 70.5 up through December 31, 2019 but has been extended for individuals who turn age 72 starting in 2020.

Lenore Cutler was vested in Plan E, terminated, and became a former vested member on August 29, 1982. On October 23, 2017, Ms. Cutler was identified under the Required Minimum Distribution process as a member who was required to begin retirement distributions. However, LACERA was unable to locate a valid address for Ms. Cutler due to the amount of time since she had left service with the County. Attempts to contact Ms. Cutler by phone led her to reach out to LACERA and submit an election to retire and receive her first retirement benefit shortly thereafter, on August 25, 2018. However, the date Ms. Cutler submitted to retire did not satisfy the minimum required distribution date set forth under Internal Revenue Code (IRC) Section 401(a)(9).

Therefore, to satisfy the requirements of Internal Revenue Code (IRC) Section 401(a)(9), Ms. Cutler needs to begin required minimum distributions no later than April 1, 2018. Retirement benefits are paid on a monthly basis at the end of each month; therefore, Ms. Cutler would receive payment for March 31, 2018 to meet the required minimum distribution date of April 1, 2018, as set forth under Internal Revenue Code (IRC) Section 401(a)(9).

It is recommended that the Board approve Ms. Cutler's change of retirement date from August 25, 2018 to March 1, 2018, to conform with Internal Revenue Code (IRC) Section 401(a)(9).

November 13, 2020

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Santos H. Kreimann <sup>SHK</sup>  
Chief Executive Officers

FOR: Board of Retirement Meeting on December 2, 2020  
Board of Investments Meeting on December 9, 2020

SUBJECT: **BOARD OF RETIREMENT AND BOARD OF INVESTMENTS 2021  
MEETING CALENDAR**

### **RECOMMENDATION**

It is recommended the Boards review the 2021 meeting calendar and consider rescheduling meeting dates that conflict with a holiday and/or the potential of a lack of quorum.

### **DISCUSSION**

Regular meetings of the Board of Retirement shall be held on the first Wednesday and the Thursday following the second Wednesday in each month. Regular meetings of the Board of Investments shall be held on the second Wednesday of each month. It is encouraged to focus on rescheduling meeting dates that conflict with a holiday and/or the potential of a lack of quorum.

For the Board of Retirement and Board of Investments, following are meeting dates that the Board may consider rescheduling:

Thursday, May 13, 2021 - SACRS Spring Conference

Thursday, November 11, 2021 - SACRS Spring Conference/Veteran's Day

A copy of the 2021 meeting and educational calendar is attached for your planning convenience.

SHK:bn

Attachment

# JANUARY 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1 New Year's Day	2
3	4	5	6 BOR	7	8	9
10	11	12	13 BOI	14 BOD	15	16
17	18 Martin Luther King Jr. Day	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

## FEBRUARY 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3 <b>BOR</b>	4	5	6
		NCPERS Fall Conference (Virtual)				
7	8	9	10 <b>BOI</b>	11 <b>BOR</b>	12	13
<b>14</b>	<b>15</b>	<b>16</b>	<b>17</b>	<b>18</b>	<b>19</b>	20
Valentine's Day	Presidents' Day	PPI Winter Roundtable (Virtual)				
21	<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	<b>26</b>	27
28	1	2	3	4	5	6

# MARCH 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	1	2	3  BOR	4	5	6
7	8  CALAPRS General Assembly (Virtual)	9	10  BOI	11  BOR	12	13
	CII Spring Conference – Washington, DC					
14	15	16	17	18	19	20
21	22	23	24	25	26	27
				PREA Spring Conference - TBD		
28	29  Cesar Chavez Day	30	31	1	2	3

## APRIL 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2 Good Friday	3
4 Easter Sunday	5	6	7 BOR	8	9	10
11	12	13	14 BOI	15 BOR	16	17
World Health Care Congress – Washington, DC						
18	19	20	21	22	23	24
25	26	27	28	29	30	1

# MAY 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	1
2	3	4	BOR	6	7	8
9 Mother's Day	10	11	BOI	BOR	14	15
SACRS Spring Conference – Long Beach, CA						
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31 Memorial Day	1	2	3	4	5

## JUNE 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31	1	2 BOR	3	4	5
6	7	8	9 BOI	10 BOR	11	12
13	14	15	16	17	18	19
Wharton Investment Strategies and Portfolio Management – Philadelphia, PA						
20 Father's Day	21	22	23	24	25	26
27	28	29	30	1	2	3



# JULY 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	1	2	3
<b>4</b> Independence Day	<b>5</b> Independence Day Holiday	<b>6</b>	<b>7</b> BOR	<b>8</b>	<b>9</b>	10
11	<b>12</b>	<b>13</b>	<b>14</b> BOI	<b>15</b> BOR	<b>16</b>	17
	ICGN Annual Conference – Toronto, Canada		PPI Summer Roundtable – Vancouver, Canada			
18	<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	24
25	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>	31

# AUGUST 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4 BOR	5	6	7
8	9	10	11 BOI	12 BOR	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

## SEPTEMBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1 <b>BOR</b>	2	3	4
5	6 Labor Day	7	8 <b>BOI</b>	9 <b>BOR</b>	10	11
12	13	14	15	16 Yom Kippur	17	18
19	20	21	22	23	24	25
CII Fall Conference – Chicago, IL						
26	27	28	29	30	1	2
CALAPRS Principles of Pension Governance for Trustees – Malibu, CA						

# OCTOBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	1	2
3	4	5	6 <b>BOR</b>	7	8	9
		ICGN Conference – Seoul, South Korea				
10	11 Indigenous People's Day	12	13 <b>BOI</b>	14 <b>BOR</b>	15	16
17	18	19	20	21	22	23
	IFEBP Employee Benefits Conference – Denver, CO					
24	25	26	27	28	29	30
	PREA Institutional Investor Conference – Chicago, IL					
	PPI Executive Seminar – Tokyo, Japan		PPI Asia Pacific Roundtable – Tokyo, Japan			
31 Halloween	1	2	3	4	5	6

# NOVEMBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3  BOR	4	5	6
7	8	9	10  BOI	11 Veterans Day BOR	12	13
CRCEA Conference – Long Beach, CA			SACRS Fall Conference – Hollywood, CA			
14	15	16	17	18	19	20
21	22	23	24	25  Thanksgiving Day	26  Thanksgiving Day Holiday	27
28	29  Hanukkah Begins	30	1	2	3	4

# DECEMBER 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1 BOR	2	3	4
5	6 Hanukkah Ends	7	8 BOI	9 BOR	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24 Christmas Eve Holiday	25 Christmas
26	27	28	29	30	31 New Year's Eve	1

## FOR INFORMATION ONLY

November 13, 2020

TO: Each Trustee  
Board of Retirement

FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: December 2, 2020 Board of Retirement Meeting

SUBJECT: **Update on COVID-19 Presumption for Disability Retirement**

During the Business Meeting of the State Association of County Retirement Systems' (SACRS) Fall Conference on November 13, 2020, staff presented LACERA's proposal entitled "COVID-19 Disability Retirement Presumption" to the SACRS membership.

No formal vote was taken at the Business Meeting on whether to approve the proposal. The purpose of the meeting was to gather comments for the SACRS Board of Directors' consideration when it meets in January 2021 to determine the next steps on this proposal. If Board of Directors decide to put forth the proposal for a vote by the membership, it would occur at the Business Meeting of the SACRS 2021 Spring Conference.

The comments from the SACRS membership who were not in support of the proposal indicated the following:

- Proposing changes to benefits structures should not be a role for plan administrators since the proposals may raise the cost of benefits.
- It may be more appropriate for an employee stakeholder group to make such a proposal.
- There are concerns on the political sensitivities of SACRS' role and visibility in proposing changes to benefits structures.
- It may be premature to make disability retirement proposals related to COVID-19 given the evolving nature of the disease.

Other comments that were in support included the following:

- The proposal should be expanded to provide a COVID-19 presumption for all members rather than just those in a frontline or first responder role.

- The proposal was not seen as a benefits enhancement since there is already an existing presumption dealing with infectious diseases due to blood-borne or skin infections.

Staff addressed various questions and concerns from the SACRS membership about the proposal. The Business Meeting's agenda packet included a fact sheet on this proposal with staff's contact information, and staff is available for further questions from the SACRS Board of Directors and membership regarding the details of the proposal.

**Reviewed and Approved:**



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**Steven P. Rice, Chief Counsel**

**Attachment**

SACRS Business Meeting Agenda Item 5.B.

cc: Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
Frank Boyd  
Ricki Contreras  
Vincent Lim  
Joe Ackler, Ackler & Associates





SACRS Business Meeting Agenda  
Friday, November 13, 2020  
9:00 AM - Upon Adjournment  
Online Via SACRS Conference Platform

SACRS Parliamentarian – TBD  
Sergeant at Arms – Bob Goodchild, San Diego CERA

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**1. SACRS System Roll Call**

Kathryn Cavness, Mendocino CERA, SACRS Secretary

**2. Secretary's Report - Receive and File**

Kathryn Cavness, Mendocino CERA, SACRS Secretary

- A. November 2019 SACRS Business Meeting Minutes

**3. Treasurer's Report - Receive and File**

Harry Hagen, Santa Barbara CERS, SACRS Treasurer

- A. July 2020 – August 2020 Financials
- B. 2020 – 2021 Annual Budget

**4. SACRS President Report - No Action**

Vivian Gray, Los Angeles CERA, SACRS President

- A. SACRS President Update

**5. SACRS Legislative Committee Update – No Action**

Eric Stern, Sacramento CERS and Dave Nelsen, Alameda CERA – SACRS Legislative Committee Co-Chairs

- A. 2020 Legislative Report – No Action
- B. Los Angeles CERA Proposal – No Action

**6. SACRS Nomination Committee - 2021-2022 SACRS Election Notice – No Action**

Dan McAllister, San Diego CERA, SACRS Nomination Committee Chair

- A. SACRS Election Notice 2021-2022

**7. SACRS Audit Report – Action**

Steve Delaney, Orange CERS, SACRS Audit Committee Chair

- A. SACRS 2018-2019 Annual Audit  
*Carry over item from Spring 2020 Conference that was cancelled due to COVID-19*



**8. SACRS Education Committee Report – No Action**

JJ Popowich, Los Angeles CERA, SACRS Education Committee Chair

- A. SACRS Annual Virtual Fall 2020 Conference Evaluations/Feedback

**9. SACRS Program Committee Report – No Action**

Roger Hilton, Orange CERS, SACRS Program Committee Chair

- A. SACRS Annual Virtual Fall Conference Report 2020

**10. SACRS Affiliate Committee Report – No Action**

Teri Noble, Pathway, SACRS Affiliate Committee Chair

- A. Affiliate Committee Update

**11. SACRS Bylaws Committee Report – Action**

Johanna Fontenot, Los Angeles CERA, SACRS Bylaws Committee Chair

- A. Use of SACRS' Intellectual Property
- B. Termination of Membership
- C. Electronic Meetings

**12. SACRS Fall Conference Breakout Reports – No Action**

A representative from each breakout will give report on their meetings.

- A. Administrators
- B. Counsel
- C. Disability/ Operations & Benefits Combo
- D. Internal Auditors
- E. Investment Officers
- F. Safety Trustees
- G. General Trustees

**13. Adjournment**

Next scheduled SACRS Association Business Meeting will be held Friday, May 14, 2021 at the Long Beach Renaissance.



## **5. SACRS Legislative Committee Update – No Action**

Eric Stern, Sacramento CERS and Dave Nelsen, Alameda CERA – SACRS Legislative Committee Co-Chairs

- A. 2020 Legislative Report – No Action
- B. Los Angeles CERA Proposal – No Action



October 21, 2020

To: SACRS Systems  
Fr: SACRS Board of Directors  
Re: COVID-19 Presumption for Disability Retirement Legislative Proposal

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Attached please find a proposal brought forward by LACERA that was presented to the Legislative Committee at their September 18<sup>th</sup> meeting.

The proposal would establish an additional presumption for certain members who apply for disability retirement due to COVID-19.

After discussion and consideration by the Legislative Committee, the Committee ultimately recommended that SACRS not sponsor the legislation this upcoming session. There was concern among the committee members that creating a new COVID-19 presumption is considered a benefit enhancement. Historically, SACRS has taken the view that such issues should be decided by the plan sponsors and their employees.

The Legislative Committee's decision was discussed at the following SACRS Board meeting on October 12. The Board decided that at the November Business Meeting, the SACRS membership would discuss this proposal as a body once it has been reviewed by the member systems. The purpose of this packet is to inform the SACRS systems of the proposal on the table as well as the discussions held by the Legislative Committee and Board on the subject.

In the meantime, the proposal will be vetted further to determine language and the proposal's impact on plan sponsors and systems. After the systems have vetted the proposal and more of the specifics have been developed by LACERA, SACRS will consider the proposal further next year.



**TO:** SACRS ADMINISTRATORS AND RETIREMENT BOARD CHAIRS  
**FROM:** Mike Robson and Trent Smith on behalf of SACRS Legislative Committee  
**SUBJECT:** SACRS 2021 LEGISLATIVE TIMELINES

If you intend to propose legislation to be sponsored by SACRS, please return your request, EXPLAINED ON THE ATTACHED WORKSHEET, before August 30, 2020 to:

Mike Robson & Trent Smith  
Edelstein, Gilbert, Robson & Smith LLC  
1127 11<sup>th</sup> Street, Suite 1030  
Sacramento, CA 95814

Email to both:

[Mike@EGRSlobby.com](mailto:Mike@EGRSlobby.com)

[Trent@EGRSlobby.com](mailto:Trent@EGRSlobby.com)

SACRS also encourages the use of the Legislative Proposal survey found on the SACRS website. <https://www.surveymonkey.com/r/sacrslegislativeproposals>

Below is the SACRS Legislative Committee calendar for soliciting legislative proposals from SACRS retirement associations for consideration in the 2021 Legislative Session:

July 3, 2020

Emailing of Committee request that retirement associations submit proposals for inclusion in the SACRS 2021 Legislative Platform.

August 30, 2020

Deadline for requests to be received by Edelstein, Gilbert, Robson & Smith LLC.

September 18, 2020

Date of Legislative Committee meeting at which requests will be discussed.

October 16, 2020

Legislative Committee will submit proposals, (both those that the Legislative Committee recommends by inclusion in SACRS Legislative Platform, and other proposals received) to all retirement associations for consideration.

November 13, 2020

Those legislative proposals recommended by the Legislative Committee, as well as other proposals, will be discussed at the SACRS Fall Conference.

**2021 SACRS LEGISLATIVE PLATFORM WORKSHEET**  
**PLEASE COMPLETE AND RETURN BY AUGUST 30, 2020**

Title of Issue: COVID-19 Disability Retirement Presumption

Association: LACERA

Contact Person: Barry Lew

Phone #: 626-564-2370

Fax #: N/A

Please answer the following questions as fully as possible:

1. Description of issue.

A member who applies for service-connected disability retirement generally has the burden of proving that his or her permanent incapacity was the result of injury or disease arising out of and in the course of employment and that the employment contributed substantially to the incapacity.

However, for certain diseases and injuries, presumptions exist under the rationale that those diseases and injuries appear to be service-connected but would be difficult for a member to prove as being service-connected.

Given the challenges of contact tracing<sup>1</sup> due to the increasingly widespread nature<sup>2</sup> of the COVID-19 pandemic, there may be cases where members contracted COVID-19 and became permanently incapacitated but have difficulty proving that the disease arose out of and in the course of employment.

2. Recommended solution.

A rebuttable presumption related to a service-connected permanent incapacity due to COVID-19 would provide that members are presumed to have contracted COVID-19 arising out of and in the course of employment, unless the presumption is controverted by other evidence.

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<sup>1</sup> Steinhauer, J., & Goodnough, A. (2020, July 31). Contact Tracing Is Failing in Many States. Here's Why. *New York Times*. <https://www.nytimes.com/2020/07/31/health/covid-contact-tracing-tests.html>; Petersen, M. (2020, July 31). L.A. County's Tracing Team Repeatedly Failed to Detect Coronavirus Outbreaks at Workplaces. *Los Angeles Times*. <https://www.latimes.com/california/story/2020-07-31/la-contact-tracers-struggle-to-keep-up-with-coronavirus-cases>

<sup>2</sup> The Johns Hopkins Center for Health Security. (2020, July 29). *Resetting Our Response: Changes Needed in the US Approach to COVID-19*. [https://www.centerforhealthsecurity.org/our-work/pubs\\_archive/pubs-pdfs/2020/200729-resetting-our-response.pdf](https://www.centerforhealthsecurity.org/our-work/pubs_archive/pubs-pdfs/2020/200729-resetting-our-response.pdf)

Although an award of workers' compensation benefits does not necessarily mean that a member also qualifies for disability retirement benefits under CERL, courts have found that the two types of benefits are related in subject matter and harmonious in purpose.

There are currently three workers' compensation bills (AB 196, AB 664, and SB 1159) in the California Legislature that provide a disputable presumption for COVID-19-related injuries that can assist us in the formulation of a new disability retirement presumption. Each bill uses different approaches as noted in the staff memo dated August 4, 2020 to the IBLC. However, SB 1159 appears to be the most comprehensive of the three bills in that it codifies Governor Newsom's Executive Order N-62-20, which provided a COVID-19 presumption for workers' compensation benefits for a specified period of time that has since expired for essential workers, and provides a presumption after that period for employees who are safety members and health care workers whose jobs cannot be done remotely and require contact with members of the public and who may be at higher risk of contracting COVID-19.

Therefore, the proposed COVID-19 presumption for disability retirement in CERL is modeled after the provisions of SB 1159 and CERL's existing disability retirement presumption that deals with other infectious diseases. The proposed presumption would apply to members in county service during the period of March 19, 2020—July 5, 2020 who are considered essential workers and were unable to shelter in place by working remotely.

Beginning July 6, 2020, the workers' compensation presumption expired. However, SB 1159 extends the presumption on and after this date for safety members and certain health care workers whose jobs require contact with members of the public potentially infected with the coronavirus. The proposed disability retirement presumption follows this rationale by designating county workers whose jobs cannot be done remotely but require contact with the public and who may be at higher risk of contracting COVID-19.

If this proposal is enacted in the 2021 legislative year, it will be effective January 1, 2022. However, there may be disability retirement applications for COVID-19-related illnesses that are filed before the effective date of the presumption. The proposal would provide that the presumption applies to new and pending applications as of the effective date and that the board may reconsider COVID-19-related applications that were denied before the effective date.

3. Specific language that you would like changed in, or added to, '37 Act Law, and suggested code section numbers.

Add a new Section 31720.10:

(a) If a member becomes ill or dies due to a COVID-19-related illness, the illness so developing or manifesting itself in those cases shall be presumed to arise out of, and in the course of, employment. The illness so developing or manifesting itself in those cases shall in no case be attributed to any illness

existing prior to that development or manifestation.

(b) Any member described in subdivision (a) permanently incapacitated for the performance of duty as a result of a COVID-19-related illness shall receive a service-connected disability retirement.

(c) The presumption described in subdivision (a) is rebuttable by other evidence. Unless so rebutted, the board is bound to find in accordance with the presumption. The presumption shall be extended to a member following termination of service for a period of 14 days.

(d) “COVID-19” means the coronavirus disease 2019 caused by the severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2).

(e) “Member” means a person—

(1) (A) in county service on or after March 19, 2020, and on or before July 5, 2020, who was designated by the State Public Health Officer in a list of essential critical infrastructure workers in accordance with the Governor’s Executive Order of March 19, 2020 (Executive Order N-33-20); and

(B) who is diagnosed with COVID-19 within 14 days after a day on or after March 19, 2020, and on or before July 5, 2020 that the person performed labor or services at the person’s place of employment at the employer’s direction. For the purpose of this subdivision, “person’s place of employment” does not include a person’s home or residence.

(2) (A) in county service on or after July 6, 2020, who is a safety member, firefighter, member active in law enforcement, county probation officer, nurse or physician who provides direct patient care at a health facility, or a custodial employee in contact with COVID-19 patients at a health facility; and

(B) who is diagnosed with COVID-19 within 14 days on or after July 6, 2020 that the person performed labor or services at the person’s place of employment at the employer’s direction. For the purpose of this subdivision, “person’s place of employment” does not include a person’s home or residence.

(f) This section applies to new and pending applications for disability retirement. This section also applies to applications for disability retirement due to COVID-19 that the board denied prior to the effective date of this section but in its discretion may reconsider after the effective date of this section.

4. Why should the proposed legislation be sponsored by SACRS rather than by your individual retirement association?

The current disability retirement presumptions apply to all SACRS systems and not just to any individual retirement system. The proposed presumption would also apply to all SACRS systems.



5. Do you anticipate that the proposed legislation would create any major problems such as conflicting with Proposition 162 or create a problem with any of the other 19 SACRS retirement associations?

The proposed legislation should not cause any conflicts with Proposition 162 or any administrative issues with the other SACRS retirement associations.

6. Who will support or oppose this proposed change in the law?

Support: labor organizations. Opposition: plan sponsors and plan sponsor organizations such as the California State Association of Counties, Urban Counties of California, and Rural County Representatives of California.

7. Who will be available from your association to testify before the Legislature?

Barry Lew and Joe Ackler.

Email or mail your legislative proposals to:

Mike Robson and Trent Smith  
Edelstein, Gilbert, Robson, & Smith LLC  
1127 11<sup>th</sup> Street, Suite 1030  
Sacramento, CA 95814

Email to both:

[Mike@EGRSlobby.com](mailto:Mike@EGRSlobby.com)  
[Trent@EGRSlobby.com](mailto:Trent@EGRSlobby.com)

# COVID-19 Presumption for Disability Retirement Fact Sheet

## Summary

The County Employees Retirement Law of 1937 currently has four presumptions that certain injuries and diseases arise out of and in the course of employment for purposes of determining a service-connected disability retirement for certain members: heart trouble, cancer, blood-borne infectious diseases, and exposure to biochemical substances.

This proposal would establish an additional presumption for certain members who apply for disability retirement due to COVID-19 that the disease arose out of and in the course of employment.

## Background

Members who apply for service-connected disability retirement generally have the burden of proving that their permanent incapacity was the result of injury or disease arising out of and in the course of employment and that the employment contributed substantially to the incapacity.

### Presumption of Service Connection

For certain injuries and diseases, presumptions exist under the rationale that those injuries and diseases appear to be service-connected but would be difficult for members to prove as being service-connected. Although the presumption relates to the service connection of the injury or disease, members are never presumed to be permanently incapacitated and have the burden of proving permanent incapacity.

### Disability Retirement Benefits

A disability retirement provides benefits to members whose careers are cut short by permanent incapacity and who may not qualify for a service retirement. However, for those disabled members who are eligible for a service retirement, their disability retirement benefit may be equal to a service retirement benefit.

Service-connected disability retirement: the benefit is the greater of 50 percent of final compensation or a service retirement benefit. The benefit is tax excludable, and survivors receive 100 percent of the benefit.

Nonservice-connected disability retirement: the benefit is the greater of a service retirement

benefit or, depending on the member's age and service, a benefit that is up to 1/3 of final compensation. The benefit is not tax excludable, and survivors receive 60 percent of the benefit.

## Issue

Members who contract COVID-19 on the job and become permanently incapacitated may be granted a service-connected disability retirement.

Given the challenges of contact tracing due to the increasingly widespread nature of the COVID-19 pandemic, there may be cases where certain members in high-risk jobs contracted COVID-19 at work and became permanently incapacitated but have difficulty proving that the disease arose out of and in the course of employment.

## Solution

A rebuttable presumption related to COVID-19 would provide that certain members who contracted COVID-19 are presumed to have contracted the disease arising out of and in the course of employment, unless the presumption is controverted by other evidence.

The presumption would apply to members who were essential workers during the time period defined in Governor Newsom's Executive Order N-62-20 (March 19, 2020 – July 5, 2020), which provided a presumption for COVID-19 for workers' compensation claims. Beginning July 6, 2020, it would apply to safety members and certain health care workers who may be at higher risk of contracting COVID-19 because their jobs cannot be performed remotely and require frequent contact with members of the public.

The proposal would apply to new and pending disability retirement applications as of its effective date of enactment into law and would provide that a retirement board may reconsider COVID-19-related applications that were denied prior to the effective date.


## Contact

Barry Lew, LACERA  
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**FOR INFORMATION ONLY**

November 20, 2020

TO: Each Trustee  
Board of Retirement

FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: December 2, 2020 Board of Retirement Meeting

SUBJECT: **Update on Legislative Proposal: Nonservice-connected Disability Retirement**

On September 4, 2019, the Board of Retirement (BOR) approved submission of a legislative proposal for inclusion in the State Association of County Retirement Systems (SACRS) 2020 legislative platform that would preclude the reduction of a nonservice-connected disability retirement allowance if the member's disability was due to the intemperate use of alcoholic liquor or drugs but not for LACERA to sponsor the legislative proposal.

On November 15, 2019 at the Business Meeting of the SACRS Fall Conference, the SACRS membership approved SACRS sponsorship for the proposal with 16 systems voting "Yes" and 4 systems voting "No." Staff was informed by one system voting "No" that although it was not opposed to the substance of the proposal, it could not support it because it was not elective and subject to local adoption.

The SACRS membership approved the proposal for sponsorship by SACRS. Since the decision was not unanimous and to prevent potential opposition by SACRS systems that did not support the proposal, the SACRS Legislative Committee and lobbyists recommended that the proposal be amended to allow for local adoption by counties as to whether the reduction of a nonservice-connected disability allowance should be precluded if the member's disability was due to the intemperate use of alcoholic liquor or drugs. Staff worked with the SACRS lobbyists and State Office of Legislative Counsel to amend the proposal reflecting the new approach.

The SACRS lobbyists were able to locate an author to introduce the legislation, Assemblyman Vince Fong, who was also a member of the Assembly Public Employment and Retirement Committee. AB 2937 was introduced on February 21, 2020. However, at the April 17, 2020 meeting of the SACRS Legislative Committee, the SACRS lobbyists explained that Assemblyman Fong would no longer be carrying the bill due to potential opposition from an employee organization. In May 2020, the SACRS

Board of Directors accepted the SACRS Legislative Committee's recommendation for SACRS to drop sponsorship of the bill. AB 2937 did not move forward in the 2020 legislative session and will not carry over into the new 2021-22 two-year legislative session.

The BOR's action at its September 4, 2019 meeting also approved the recommendation for LACERA itself not to sponsor this legislative proposal. Therefore, staff understands this issue to be concluded absent further instruction from the BOR.

**Reviewed and Approved:**

A handwritten signature in blue ink that reads "Steven P. Rice".

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**Steven P. Rice, Chief Counsel**

cc: Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
Frank Boyd  
Ricki Contreras  
Vincent Lim  
Joe Ackler, Acker & Associates

**FOR INFORMATION ONLY**

November 23, 2020

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Barry W. Lew *BW*  
Legislative Affairs Officer

FOR: December 2, 2020 Board of Retirement Meeting  
December 9, 2020 Board of Investments Meeting

SUBJECT: **2020 Year-End Legislative Report**

**INTRODUCTION**

This report presents a year-end summary of bills on which LACERA took a position and of enacted bills that may require implementation by LACERA. Also attached is a year-end election update from the State Association of County Retirement Systems' (SACRS) legislative advocates.

The California Legislature adjourned on August 31, 2020. Any bills that were passed by the Legislature before adjournment are dead and would not carry over to the next legislative session since 2020 is the second year of the 2019-20 two-year session. September 30, 2020 was the last day for the Governor to sign or veto bills. Unless otherwise noted, the bills signed into law become effective January 1, 2021.

The 2nd session of the 116th Congress (2019-20) is not expected to conclude until January 3, 2021, and staff will continue monitoring the federal legislation in this report.

**POSITIONS**

The BOR reviewed and took positions on 10 bills during the 2019-20 legislative session. The BOI did not take any positions. Staff worked with LACERA's legislative advocates to send position letters during the legislative cycle.

Support – 8	AB 287, AB 2937, HR 141, HR 3934, HR 4540, HR 6436, S 521, SJR 3
Oppose – 2	AB 199, AB 664

## I. California Legislation

### ***AB 199 (Calderon): California Online Notary Act of 2019***

Summary: Would allow a notary public to register with the Secretary of State to be an online notary public. Would authorize an online notary public to perform notarial acts by means of audio-video communications and establish various requirements applicable to an online notary public.

Status: In ASSEMBLY. Died pursuant to Art. IV, Sec. 10(c) of the Constitution. (02/03/2020)

BOR Position: Oppose.

### ***AB 287 (Voepel): Public Employees' Retirement: Annual Audits***

Summary: Would require each state and local pension or retirement system to post a concise annual audit of the investments and earnings of the system on that system's internet website no later than the ninetieth day following the audit's completion.

Status: In ASSEMBLY. Died pursuant to Art. IV, Sec. 10(c) of the Constitution. (02/03/2020)

BOR Position: Support.

### ***AB 664 (Cooper): County Employees' Retirement: Permanent Incapacity***

Summary: Would require for purposes of determining permanent incapacity of certain members employed as peace officers in the County of Sacramento that those members be evaluated by the retirement system to determine if they can perform all the usual and customary duties of a peace officer. Would also require the board of retirement to develop a method of tracking the costs of providing permanent disability retirement to members who become eligible for disability retirement pursuant to the bill's provisions. Would repeal these provisions on December 31, 2024.

Status: Ordered to inactive file by unanimous consent. (09/01/2020)

BOR Position: Oppose.

Note: LACERA's opposition was on the version of the bill that provided for the determination of permanent incapacity for purposes of disability retirement. The bill was subsequently amended to a different subject matter to provide for a COVID-19 presumption for purposes of workers' compensation, which LACERA did not take a position on.

***AB 2937 (Fong): CERL: Nonservice-connected Disability Retirement.***

Summary: Would create an optional provision, to be elected by a county board of supervisors by resolution adopted by majority vote, that would remove the retirement board's assessment regarding the intemperate use of alcoholic liquor or drugs as a condition on the purchase of a disability retirement pension by county or district contributions.

Status: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIRMENT. (03/05/2020)

BOR Position: Support.

Note: A more detailed update regarding the disposition of this item is provided under separate cover since the bill is based on a proposal submitted by LACERA to SACRS for sponsorship.

***SJR 3 (Wilk): Social Security***

Summary: Would request the Congress of the United States to enact, and the President to sign, legislation that would repeal the government pension offset and the windfall elimination provision from the Social Security Act.

Status: Chaptered by Secretary of State. (08/19/2019)

BOR Position: Support.

## **II. Federal Legislation**

***HR 141 (Davis): Social Security Fairness Act of 2019***

Summary: Repeals provisions that reduce Social Security benefits for individual receiving pension benefits from a state or local government. Eliminates the windfall elimination provision and government pension offset.

Status: Referred to Subcommittee on Social Security. (01/31/2019)

BOR Position: Support.

***HR 3934 (Brady): Equal Treatment of Public Servants Act of 2019***

Summary: Replaces the windfall elimination provision with a formula equalizing benefits for certain individuals with noncovered employment.

Status: Referred to Subcommittee on Social Security. (07/24/2019)

BOR Position: Support.

***HR 4540 (Neal): Public Servants Protection and Fairness Act***

Summary: Provides an equitable Social Security formula for individuals with noncovered employment and provides relief for individuals currently affected by the windfall elimination provision.

Status: Referred to the Subcommittee on Social Security. (09/27/2019)

BOR Position: Support.

***HR 6436 (Chabot): Police and Fire Health Care Protection Act of 2020***

Summary: Would revise provisions relating to distributions from accident or health plans or qualified long-term care insurance contracts of retired public safety officers. Would eliminate the requirement that payment of plan premiums must be made directly to plan providers in order for plan distributions to be excludible from employee gross income.

Status: Referred to Subcommittee on Health. (04/30/2020)

BOR Position: Support.

***S 521 (Brown): Social Security Fairness Act***

Summary: Repeals provisions that reduce Social Security benefits for individual receiving pension benefits from a state or local government. Eliminates the windfall elimination provision and government pension offset.

Status: Read twice and referred to the Committee on Finance. (02/14/2019)

BOR Position: Support.

**BALLOT MEASURES**

The November 3, 2020 election also had a number of statewide ballot measures. Although none of the ballot measures proposed any changes to pension benefits, some of them contained subject matter related to programs administered by LACERA such as commercial real estate, health care, privacy and government employment and contracting.

<i>Propositions</i>	<i>Result</i>
<u>Proposition 14: Medical Research</u> This measure would authorize state general obligation bonds to continue funding stem cell and other medical research on diseases such as	Passed



<i>Propositions</i>	<i>Result</i>
Alzheimer's, Parkinson's, stroke, epilepsy, and other central nervous system diseases.	
<u>Proposition 15: Commercial Property Taxes</u> This measure would increase funding for public schools, community colleges, and local governments by requiring that commercial and industrial real property be taxed based on current market value.	Defeated
<u>Proposition 16: Repeal of Proposition 209</u> This measure would repeal the provisions in the California Constitution enacted by Proposition 209 in 1996, which prohibited the state from discriminating against, or granting preferential treatment to, any individual or group on the basis of race, sex, color, ethnicity, or national origin in the operation of public employment, public education, or public contracting.	Defeated
<u>Proposition 23: Regulation of Kidney Dialysis Clinics</u> This measure would authorize state regulation of kidney dialysis clinics and establishes minimum staffing and other requirements such as data reporting of infection rates, state approval for clinics to close or reduce services, and prohibiting clinics from discriminating against patients based on payment sources for care.	Defeated
<u>Proposition 24: Consumer Privacy</u> The measure would permit consumers to prevent businesses from sharing personal information, correct inaccurate personal information, and limit businesses' use of "sensitive personal information" such as geolocation, race, ethnicity, religion, genetic data, union membership, private communications, and certain sexual orientation, health, and biometric information. It would also establish criteria for business compliance, prohibit retention of personal information that is longer than necessary by businesses, and provide penalties for violations.	Passed

**ENACTED LEGISLATION: OPTIONAL IMPLEMENTATION**

AB 2101 (Committee on Public Employment and Retirement) is an omnibus bill that made several technical changes to the County Employees Retirement Law of 1937. Two notable provisions provide for optional implementation.

- Parental leave: A member who returns from an uncompensated leave of absence on account of parental leave may receive service credit for the absence upon

payment of member and employee contributions plus interest. This provision becomes operative upon adoption by the board of supervisors.

- **Service Retirement Application Window:** A member who files for a service retirement must set forth an effective date that is not more than 60 days after the application date. This is an arbitrary timeline, and AB 2101 provides flexibility for a board of retirement to set a different number of days.

AB 2101 was sponsored by the State Association of County Retirement Systems (SACRS), and its Legislative Committee is developing a number of items for an omnibus bill for the 2021-22 state legislative session.

### **CONCLUSION**

Next year the new 2021-22 legislative session begins. Staff will keep the Boards apprised through the regular monthly legislative status reports. Staff is reviewing the current format for the monthly reports and contemplates modifying the format of the reports through the use of categories and subject matter to make the reports more informative.

**Reviewed and Approved:**



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**Steven P. Rice, Chief Counsel**

### **Attachments**

LACERA Legislative Report Index  
LACERA Legislative Report  
SACRS Legislative Update

cc: LACERA Division Managers  
Santos H. Kreimann  
JJ Popowich  
Steven P. Rice  
Anthony J. Roda, Williams & Jensen  
Joe Ackler, Ackler & Associates

LACERA Legislative Report  
 2019-2020 Legislative Session  
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STATE - ASSEMBLY BILLS	TITLE	STATUS	BOR POSITION	PAGE
AB 196.....	Workers' Compensation: Coronavirus.....	Failed - Adjourned.....		9
AB 664.....	Workers' Compensation: Injury: Communicable Disease.....	Failed - Adjourned.....	Oppose 06/05/2019...	9
AB 685.....	COVID 19: Imminent Hazard to Employees: Exposure.....	Enacted.....		10
AB 992.....	Open Meetings: Local Agencies: Social Media.....	Enacted.....		7
AB 1107.....	Proclaimed State Emergencies.....	Failed - Adjourned.....		10
AB 1839.....	Coronavirus Recovery Deal.....	Failed - Adjourned.....		10
AB 1945.....	Emergency Services: First Responders.....	Enacted.....		7
AB 2101.....	Public Employees Retirement.....	Enacted.....		1
AB 2438.....	Public Records Act: Conforming Revisions.....	Failed - Adjourned.....		7
AB 2452.....	State Auditor: Audits: High Risk Local Government.....	Failed - Adjourned.....		8
AB 2473.....	Public Investment Funds.....	Failed - Adjourned.....		8
AB 2496.....	Income Taxes: Credits: Cleaning Supplies: Coronavirus.....	Failed - Adjourned.....		11
AB 2780.....	Public Employee Retirement Systems: Investments.....	Failed - Adjourned.....		8
AB 2887.....	Statewide Emergencies: Mitigation.....	Failed - Adjourned.....		11
AB 2937.....	CERL: Non-Service-Connected Disability Retirement.....	Failed - Adjourned.....	Support 04/09/2020....	1
AB 3216.....	Unemployment: Rehiring and Retention: Emergency.....	Vetoed.....		11
AB 3249.....	Public Retirement: Controller: Annual Report.....	Failed - Adjourned.....		8
AB 3329.....	Unemployment Insurance: Coronavirus Pandemic.....	Failed - Adjourned.....		11
ACA 5.....	Government Preferences.....	Adopted.....		8

STATE - SENATE BILLS

SB 89.....	Budget Act.....	Enacted.....		12
SB 117.....	Education Finance.....	Enacted.....		12
SB 430.....	Public Employees Retirement Benefits: Judges.....	Failed - Adjourned.....		1
SB 783.....	County Employees Retirement Law of 1937.....	Failed - Adjourned.....		1
SB 893.....	Workers' Compensation: Hospital Employees.....	Failed - Adjourned.....		12
SB 931.....	Local Government Meetings: Agenda and Documents.....	Failed - Adjourned.....		9
SB 939.....	Emergencies: Coronavirus: Evictions.....	Failed - Adjourned.....		12
SB 943.....	Paid Family Leave: Coronavirus.....	Failed - Adjourned.....		12
SB 1159.....	Workers Compensation: Coronavirus: Critical Workers.....	Enacted.....		13
SB 1297.....	Public Employees' Retirement.....	Failed - Adjourned.....		2
SB 1322.....	Remote Online Notarization Act.....	Failed - Adjourned.....		13
SB 1371.....	Maintenance of the Codes.....	Enacted.....		2

STATE - EXECUTIVE ORDERS

N-62-20.....	Coronavirus and Workers' Compensation Benefits.....			13
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FEDERAL - HOUSE BILLS

HR 141.....	Government Pension Offset Repeal.....	Pending.....	Support 04/11/2019...	5
HR 266.....	Paycheck Protection Program and Health Care Enhancement.....	Enacted.....		2
HR 748.....	CARES Act.....	Enacted.....		2
HR 3934.....	Windfall Elimination Provision Replacement.....	Pending.....	Support 02/05/2020....	6
HR 4540.....	Non Covered Employment Social Security Provision.....	Pending.....	Support 02/05/2020....	6
HR 4897.....	Governmental Retirement Plans Income.....	Pending.....		6
HR 6074.....	Coronavirus Preparedness and Response Appropriations.....	Enacted.....		3
HR 6201.....	Families First Coronavirus Response Act.....	Enacted.....		3
HR 6436.....	Health Plans Direct Payment Requirement.....	Pending.....	Support 07/01/2020....	6
HR 6800.....	HEROES Act.....	Pending.....		3
HR 8567.....	Mandatory Retirement Distributions Age Increase.....	Pending.....		6

FEDERAL - SENATE BILLS

S 521.....	Government Pension Offset Repeal.....	Pending.....	Support 04/11/2019...	7
S 3607.....	Public Safety Officer Death Benefits.....	Enacted.....		3
S 3608.....	CARES Act Funds Flexibility.....	Pending.....		3
S 3752.....	Coronavirus Local Community Stabilization Fund.....	Pending.....		3
S 4317.....	SAFE TO WORK Act.....	Pending.....		4
S 4318.....	American Workers Families and Employers Assistance Act.....	Pending.....		4
S 4319.....	Supporting Americas Restaurant Workers Act.....	Pending.....		4
S 4320.....	Coronavirus Response Supplemental Appropriations.....	Pending.....		4
S 4321.....	Continuing Small Business Recovery.....	Pending.....		4
S 4322.....	Safely Back to School and Back to Work Act.....	Pending.....		5

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S 4323.....	TRUST Act of 2020.....	Pending.....	5
S 4324.....	Critical Supply Chains and Intellectual Property Act.....	Pending.....	5

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File name: CERL-PEPRA-2020

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CA AB 2101	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LAST AMEND:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Public Employment and Retirement Cmt Public Employees Retirement 02/06/2020 08/07/2020 Enacted Amends existing law relating to the State Teachers' Retirement System. Removes the requirement that the election for continued defined benefit coverage be filed with the other public retirement system. Includes as creditable service activities performed for an employer by an audiometrist who holds a certificate of registration issued by the State Department of Health Care Services. Defines leave of absence.
CA AB 2937	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Fong [R] CERL: Non-Service-Connected Disability Retirement 02/21/2020 Failed - Adjourned Creates an optional provision, to be elected by a county board of supervisors by resolution adopted by majority vote, that would remove the retirement board's assessment regarding the intemperate use of alcoholic liquor or drugs as a condition on the purchase of a disability retirement pension by county or district contributions.
	<b>Comments:</b> <b>BOR_Position:</b> <b>Staff_Recommendation:</b>	SACRS-sponsored bill based on LACERA's proposal. Support 04/09/2020 Support
CA SB 430	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LAST AMEND:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Wieckowski [D] Public Employees Retirement Benefits: Judges 02/21/2019 05/17/2019 Failed - Adjourned Relates to the State Public Employees' Pension Reform Act of 2013. Grants a judge who was elected to office in a specific year the option of making a one-time, irrevocable election to have a membership status prior to a certain date in the Judges' Retirement System II for service accrued after a certain date.
	<b>Staff_Action:</b>	Monitoring
CA SB 783	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>SUMMARY:</b>	Labor, Public Employment & Retirement Cmt County Employees Retirement Law of 1937 03/07/2019 Failed - Adjourned Corrects several erroneous and obsolete cross references within the County Employees Retirement Law of 1937.
	<b>Comments:</b>	SB 783 was folded into AB 2101 to create a combined clean-up bill with

CalPERS and CalSTRS.  
**Staff\_Action:** Monitoring

CA SB 1297 **AUTHOR:** Moorlach [R]  
**TITLE:** Public Employees' Retirement  
**INTRODUCED:** 02/21/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Relates to the Public Employees' Retirement System, the State Teachers' Retirement System, the Judges' Retirement System, the Judges' Retirement System II, county and district retirement systems created pursuant to the County Employees' Retirement Law of 1937. Revises the provision of pension and other benefits to members of all state or local public retirement systems, among others.

**Staff\_Action:** Monitoring

CA SB 1371 **AUTHOR:** Judiciary Cmt  
**TITLE:** Maintenance of the Codes  
**INTRODUCED:** 02/21/2020  
**DISPOSITION:** Enacted  
**SUMMARY:**

Makes nonsubstantive changes in various provisions relative to directing the Legislative Counsel to advise the Legislature from time to time as to legislation necessary to maintain the Codes.

**Comments:**

Makes nonsubstantive change to CERL Section 31631.5 per Legislative Counsel's recommendation.

**Staff\_Action:** Monitoring

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File name: FEDERAL-Covid-19

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US HR 266 **SPONSOR:** McCollum [D]  
**TITLE:** Paycheck Protection Program and Health Care Enhancement  
**INTRODUCED:** 01/08/2019  
**LAST AMEND:** 04/21/2020  
**DISPOSITION:** Enacted  
**SUMMARY:**

Makes amendments to the Paycheck Protection Program, economic injury disaster loans, and emergency grants pursuant to the Coronavirus Aid, Relief, and Economic Security Act; relates to small business programs; makes additional emergency appropriations for coronavirus response.

**Comments:**

Additional funds appropriated for Paycheck Protection Program.

US HR 748 **SPONSOR:** Courtney [D]  
**TITLE:** CARES Act  
**INTRODUCED:** 01/24/2019  
**LAST AMEND:** 03/25/2020  
**DISPOSITION:** Enacted  
**SUMMARY:**

Enacts the Coronavirus Aid, Relief, and Economic Security, or CARES, Act; provides emergency assistance and health care response for individuals, families, and businesses affected by the 2020 coronavirus pandemic.

US HR 6074	<p><b>SPONSOR:</b> Lowey [D]  <b>TITLE:</b> Coronavirus Preparedness and Response Appropriations  <b>INTRODUCED:</b> 03/04/2020  <b>DISPOSITION:</b> Enacted  <b>SUMMARY:</b>  Establishes the Coronavirus Preparedness and Response Supplemental Appropriations Act; makes emergency supplemental appropriations in response to the outbreak of the Coronavirus.</p>
US HR 6201	<p><b>SPONSOR:</b> Lowey [D]  <b>TITLE:</b> Families First Coronavirus Response Act  <b>INTRODUCED:</b> 03/11/2020  <b>LAST AMEND:</b> 03/14/2020  <b>DISPOSITION:</b> Enacted  <b>SUMMARY:</b>  Provides for the Families First Coronavirus Response Act; provides specified supplement appropriations.</p>
US HR 6800	<p><b>SPONSOR:</b> Lowey [D]  <b>TITLE:</b> HEROES Act  <b>INTRODUCED:</b> 05/12/2020  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  Provides for the HEROES Act.</p>
US S 3607	<p><b>SPONSOR:</b> Grassley [R]  <b>TITLE:</b> Public Safety Officer Death Benefits  <b>INTRODUCED:</b> 05/05/2020  <b>LAST AMEND:</b> 05/14/2020  <b>DISPOSITION:</b> Enacted  <b>SUMMARY:</b>  Extends public safety officer death benefits to public safety officers whose death is caused by COVID-19.  <b>Staff_Action:</b> Monitoring</p>
US S 3608	<p><b>SPONSOR:</b> Kennedy [R]  <b>TITLE:</b> CARES Act Funds Flexibility  <b>INTRODUCED:</b> 05/05/2020  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  Amends the CARES Act; provides flexibility in use of funds by states, Indian Tribes, and municipalities.  <b>Comments:</b>  Would prohibit any federal aid to be provided directly to state pension funds.  <b>Staff_Action:</b> Monitoring</p>
US S 3752	<p><b>SPONSOR:</b> Menendez [D]  <b>TITLE:</b> Coronavirus Local Community Stabilization Fund  <b>INTRODUCED:</b> 05/18/2020  <b>DISPOSITION:</b> Pending  <b>SUMMARY:</b>  Amends Title VI of the Social Security Act; establishes a Coronavirus Local Community Stabilization Fund.</p>

**Comments:**

Would prohibit use of federal funds authorized by this bill by states for pension funds.

**Staff\_Action:** Monitoring

US S 4317

**SPONSOR:** Cornyn [R]  
**TITLE:** SAFE TO WORK Act  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**

Provides for the SAFE TO WORK Act.

**Comments:**

One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).

**Staff\_Action:** Monitoring

US S 4318

**SPONSOR:** Grassley [R]  
**TITLE:** American Workers Families and Employers Assistance Act  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**

Provides for the American Workers, Families, and Employers Assistance Act.

**Comments:**

One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).

**Staff\_Action:** Monitoring

US S 4319

**SPONSOR:** Scott T [R]  
**TITLE:** Supporting Americas Restaurant Workers Act  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**

Provides for the Supporting America's Restaurant Workers Act.

**Comments:**

One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).

**Staff\_Action:** Monitoring

US S 4320

**SPONSOR:** Shelby [R]  
**TITLE:** Coronavirus Response Supplemental Appropriations  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**

Provides for the Coronavirus Response Additional Supplemental Appropriations Act, 2020.

**Comments:**

One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).

**Staff\_Action:** Monitoring

US S 4321

**SPONSOR:** Rubio [R]  
**TITLE:** Continuing Small Business Recovery  
**INTRODUCED:** 07/27/2020



**DISPOSITION:** Pending  
**SUMMARY:**  
Provides for the Continuing Small Business Recovery and Paycheck Protection Program Act.  
**Comments:**  
One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).  
**Staff\_Action:** Monitoring

US S 4322 **SPONSOR:** Alexander L [R]  
**TITLE:** Safely Back to School and Back to Work Act  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**  
Provides for the Safely Back to School and Back to Work Act.  
**Comments:**  
One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).  
**Staff\_Action:** Monitoring

US S 4323 **SPONSOR:** Romney [R]  
**TITLE:** TRUST Act of 2020  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**  
Provides for the TRUST Act of 2020.  
**Comments:**  
One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).  
**Staff\_Action:** Monitoring

US S 4324 **SPONSOR:** Graham [R]  
**TITLE:** Critical Supply Chains and Intellectual Property Act  
**INTRODUCED:** 07/27/2020  
**DISPOSITION:** Pending  
**SUMMARY:**  
Provides for the Restoring Critical Supply Chains and Intellectual Property Act.  
**Comments:**  
One of eight individual bills that is part of the Health, Economic Assistance, Liability Protection and Schools Act (HEALS Act).  
**Staff\_Action:** Monitoring

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File name: Federal-2020

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US HR 141 **SPONSOR:** Davis R [R]  
**TITLE:** Government Pension Offset Repeal  
**INTRODUCED:** 01/03/2019  
**DISPOSITION:** Pending  
**SUMMARY:**  
Amends Title II of the Social Security Act; repeals the Government pension offset and windfall elimination provisions.  
**BOR\_Position:** Support 04/11/2019  
**IBLC\_Recommendation:** Support 03/14/2019  
**Staff\_Recommendation:** Support

US HR 3934      **SPONSOR:**                Brady K [R]  
**TITLE:**                        Windfall Elimination Provision Replacement  
**INTRODUCED:**                07/24/2019  
**DISPOSITION:**                Pending  
**SUMMARY:**  
Amends Title II of the Social Security Act; replaces the windfall elimination provision with a formula equalizing benefits for certain individuals with non-covered employment.  
**BOR\_Position:**                Support 02/05/2020  
**IBLC\_Recommendation:** Watch 01/09/2020  
**Staff\_Recommendation:** Watch

US HR 4540      **SPONSOR:**                Neal [D]  
**TITLE:**                        Non Covered Employment Social Security Provision  
**INTRODUCED:**                09/27/2019  
**DISPOSITION:**                Pending  
**SUMMARY:**  
Provides an equitable Social Security formula for individuals with non covered employment; provides relief for individuals currently affected by the Windfall Elimination Provision.  
**BOR\_Position:**                Support 02/05/2020  
**IBLC\_Recommendation:** Watch 01/09/2020  
**Staff\_Recommendation:** Watch

US HR 4897      **SPONSOR:**                Lipinski [D]  
**TITLE:**                        Governmental Retirement Plans Income  
**INTRODUCED:**                10/29/2019  
**DISPOSITION:**                Pending  
**SUMMARY:**  
Amends the Internal Revenue Code; increases the amount excluded from gross income by reason of distributions from governmental retirement plans for health and long term care insurance for public safety officers.  
**Comments:**  
Would increase the current Public Safety Officer tax exclusion from \$3,000 to \$6,000.  
**Staff\_Action:**                Monitoring

US HR 6436      **SPONSOR:**                Chabot [R]  
**TITLE:**                        Health Plans Direct Payment Requirement  
**INTRODUCED:**                04/03/2020  
**DISPOSITION:**                Pending  
**SUMMARY:**  
Amends the Internal Revenue Code; repeals the direct payment requirement on the exclusion from gross income of distributions from governmental plans for health and long term care insurance.  
**BOR\_Position:**                Support 07/01/2020  
**IBLC\_Position:**                Support 06/11/2020  
**Staff\_Recommendation:** Support

US HR 8567      **SPONSOR:**                Murphy S [D]  
**TITLE:**                        Mandatory Retirement Distributions Age Increase  
**INTRODUCED:**                10/09/2020

**DISPOSITION:** Pending

**SUMMARY:**

Amends the Internal Revenue Code of 1986; increases to 75 the required beginning date age for mandatory retirement distributions; exempts from such distribution rules individuals with lower account balances.

US S 521

**SPONSOR:** Brown S [D]

**TITLE:** Government Pension Offset Repeal

**INTRODUCED:** 02/14/2019

**DISPOSITION:** Pending

**SUMMARY:**

Amends Title II of the Social Security Act; repeals the Government pension offset and windfall elimination provisions.

**BOR\_Position:** Support 04/11/2019

**IBLC\_Recommendation:** Support 03/14/2019

**Staff\_Recommendation:** Support

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File name: Other-2020

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CA AB 992

**AUTHOR:** Mullin [D]

**TITLE:** Open Meetings: Local Agencies: Social Media

**INTRODUCED:** 02/21/2019

**LAST AMEND:** 07/31/2020

**DISPOSITION:** Enacted

**SUMMARY:**

Allows a member to engage in separate conversations or communications outside of a meeting authorized by the Ralph M. Brown Act with any other person using an internet based social media platform to answer questions, provide information to the public, or to solicit information from the public regarding a matter that is within the subject matter jurisdiction of the legislative body.

**Staff\_Action:** Monitoring

CA AB 1945

**AUTHOR:** Salas [D]

**TITLE:** Emergency Services: First Responders

**INTRODUCED:** 01/17/2020

**LAST AMEND:** 06/29/2020

**DISPOSITION:** Enacted

**SUMMARY:**

Defines first responder, for purposes of the California Emergency Services Act, to include certain personnel. Provides that the definition of first responder does not confer a right to an employee to obtain a retirement benefit formula for an employment classification that is not included in, or is expressly excluded from, that formula.

**Staff\_Action:** Monitoring

CA AB 2438

**AUTHOR:** Chau [D]

**TITLE:** Public Records Act: Conforming Revisions

**INTRODUCED:** 02/19/2020

**DISPOSITION:** Failed - Adjourned

**SUMMARY:**

Enacts various conforming and technical changes related to another bill that recodifies and reorganizes the Public Records Act. Becomes operative only if the related bill recodifying the act is enacted and becomes operative on January 1,

2022.

**Comments:**

Proposed conforming change to Section 7514.7.

- CA AB 2452      **AUTHOR:** Garcia [D]  
**TITLE:** State Auditor: Audits: High Risk Local Government  
**INTRODUCED:** 02/19/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**  
Authorizes the State Auditor to include in the high risk local government agency audit program any local agency or district association that the State Auditor identifies as being at high risk for the potential of waste, fraud, abuse, or mismanagement or that has major challenges associated with its economy, efficiency, or effectiveness.  
**Staff\_Action:** Monitoring
- CA AB 2473      **AUTHOR:** Cooper [D]  
**TITLE:** Public Investment Funds  
**INTRODUCED:** 02/19/2020  
**LAST AMEND:** 07/28/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**  
Exempts from disclosure under California Public Records Act specified records regarding an internally managed private loan made directly by a public investment fund, including quarterly and annual financial statements of the borrower or its constituent owners, unless the information has already been publicly released by the keeper of the information. Makes nonsubstantive changes to certain other provisions. Defines terms.  
**Staff\_Action:** Monitoring
- CA AB 2780      **AUTHOR:** Holden [D]  
**TITLE:** Public Employee Retirement Systems: Investments  
**INTRODUCED:** 02/20/2020  
**LAST AMEND:** 05/04/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**  
Prohibits the boards of specified public pension or retirement systems from making additional or new investments or renew existing investments of public employee retirement funds in any investment vehicle that is issued or owned by the government of Azerbaijan or Turkey, upon the passage of a federal law imposing sanctions on the government of Turkey for imposing an economic blockade of Armenia.
- CA AB 3249      **AUTHOR:** Fong [R]  
**TITLE:** Public Retirement: Controller: Annual Report  
**INTRODUCED:** 02/21/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**  
Requires the Controller to post the report on the financial condition of all state and local public retirement systems on the Controller's internet website.  
**Staff\_Action:** Monitoring
- CA ACA 5      **AUTHOR:** Weber [D]

**TITLE:** Government Preferences  
**INTRODUCED:** 01/18/2019  
**LAST AMEND:** 05/04/2020  
**DISPOSITION:** Adopted  
**SUMMARY:**

Proposes an amendment to the state Constitution to repeal provisions enacted by the initiative Proposition 209 which prohibits the state from discriminating against, or granting preferential treatment to, any individual or group on the basis of race, sex, color, ethnicity, or national origin, in the operation of public employment, public education, or public contracting.

**Comments:**

On the Nov. 3, 2020 ballot as Proposition 16.

**Staff\_Action:** Monitoring

CA SB 931

**AUTHOR:** Wieckowski [D]  
**TITLE:** Local Government Meetings: Agenda and Documents  
**INTRODUCED:** 02/05/2020  
**LAST AMEND:** 04/02/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Requires, if the local agency has an internet website to deliver by email the agendas and documents for local government meetings. Require, where the local agency determines it is technologically infeasible to send a copy of all documents constituting the agenda packet or a website link containing the documents by electronic mail or by other electronic means.

**Staff\_Action:** Monitoring

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File name: STATE-Covid-19

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CA AB 196

**AUTHOR:** Gonzalez [D]  
**TITLE:** Workers' Compensation: Coronavirus  
**INTRODUCED:** 01/10/2019  
**LAST AMEND:** 08/25/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Defines injury for certain employees who are employed in an occupation or industry deemed essential except as specified, or who are subsequently deemed essential, to include coronavirus disease that develops or manifests itself during a period of employment of those persons in the essential occupation or industry. Creates a disputable presumption that the injury arose out of and in the course of the employment. Shortens the investigatory timeframe.

**Staff\_Action:** Monitoring

CA AB 664

**AUTHOR:** Cooper [D]  
**TITLE:** Workers' Compensation: Injury: Communicable Disease  
**INTRODUCED:** 02/15/2019  
**LAST AMEND:** 08/25/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Defines injury, for certain state and local firefighting personnel, peace officers, correctional and law enforcement personnel, health care employees who provide direct patient care at an acute care hospital, and fire and rescue services coordinators who work for the Office of Emergency Services to include illness or death resulting from COVID 19 that is diagnosed on or after a specified date, if

certain circumstances apply.

**Comments:**

As amended on 4/17/2020, the bill no longer relates to disability retirement and relates to a presumption under workers' compensation.

**BOR\_Position:** Oppose 06/05/2019, Support 05/01/2019

**IBLC\_Recommendation:** Support 04/11/2019

**Staff\_Action:** Monitoring

**Staff\_Recommendation:** Watch

CA AB 685

**AUTHOR:** Reyes [D]

**TITLE:** COVID 19: Imminent Hazard to Employees: Exposure

**INTRODUCED:** 02/15/2019

**LAST AMEND:** 08/25/2020

**DISPOSITION:** Enacted

**SUMMARY:**

Authorizes the Division of Occupational Safety and Health, when, in its opinion, a place of employment, operation, or process, or any part thereof, exposes workers to the risk of infection with severe acute respiratory syndrome, also known as coronavirus, so as to constitute an imminent hazard to employees, to prohibit the performance of that operation or process, or entry into that place of employment.

CA AB 1107

**AUTHOR:** Chu [D]

**TITLE:** Proclaimed State Emergencies

**INTRODUCED:** 02/21/2019

**LAST AMEND:** 08/07/2020

**DISPOSITION:** Failed - Adjourned

**SUMMARY:**

Requires all proclamations, materials, and announcements made by the Governor or issued by a state agency related to a duly proclaimed state of emergency to be made available statewide in all the threshold languages spoken limited English proficient speakers. Defines the term threshold languages spoken by limited English proficient speakers to mean all MediCal threshold languages spoken by any threshold population group without limitation to county specific thresholds.

**Staff\_Action:** Monitoring

CA AB 1839

**AUTHOR:** Bonta [D]

**TITLE:** Coronavirus Recovery Deal

**INTRODUCED:** 01/06/2020

**LAST AMEND:** 05/07/2020

**DISPOSITION:** Failed - Adjourned

**SUMMARY:**

Enacts the Coronavirus Recovery Deal. Makes a series of legislative findings and declarations pertaining to the coronavirus pandemic and various economic, environmental, and social conditions in the state. States the intent of the Legislature that the state adopt a policy framework with principles and goals committed to accomplish specified economic, environmental, and social objectives and priorities as part of the coronavirus recovery spending.

**Comments:**

Would support the inclusion of pensions among other benefits that should be included in new employment opportunities for workers in all sectors who have lost jobs or income as a result of the pandemic.

	<b>Staff_Action:</b>	Monitoring
CA AB 2496	<b>AUTHOR:</b>	Choi [R]
	<b>TITLE:</b>	Income Taxes: Credits: Cleaning Supplies: Coronavirus
	<b>INTRODUCED:</b>	02/19/2020
	<b>LAST AMEND:</b>	05/04/2020
	<b>DISPOSITION:</b>	Failed - Adjourned
	<b>SUMMARY:</b>	Allows a credit against income taxes to a taxpayer that is a business with a physical location in the state in an amount equal to the costs paid or incurred by the qualified taxpayer during the taxable year for the purchase of cleaning and sanitizing supplies used at business locations in the state to prevent the transmission of the novel coronavirus.
CA AB 2887	<b>AUTHOR:</b>	Bonta [D]
	<b>TITLE:</b>	Statewide Emergencies: Mitigation
	<b>INTRODUCED:</b>	02/21/2020
	<b>LAST AMEND:</b>	03/16/2020
	<b>DISPOSITION:</b>	Failed - Adjourned
	<b>SUMMARY:</b>	Adds provisions relating to states of emergency, including the coronavirus pandemic. Provides for school meal distribution. Provides a moratorium on rent collection from small businesses. Requires zero interest rate loans for small businesses and nonprofit organizations. Provides paid sick leave for all employees regardless of term of employment. Prohibits the termination of utility service for certain nonpayment after the declaration of a state of emergency.
	<b>Staff_Action:</b>	Monitoring
CA AB 3216	<b>AUTHOR:</b>	Kalra [D]
	<b>TITLE:</b>	Unemployment: Rehiring and Retention: Emergency
	<b>INTRODUCED:</b>	02/21/2020
	<b>LAST AMEND:</b>	08/20/2020
	<b>DISPOSITION:</b>	Vetoed
	<b>SUMMARY:</b>	Requires an employer to offer its laid off employees specified information about job positions that become available for which the laid off employees are qualified, and to offer positions to those employees based on a preference system. Defines the term laid off employee. Authorizes an employee to enforce violations by filing an action with the Division of Labor Standards.
	<b>Staff_Action:</b>	Monitoring
CA AB 3329	<b>AUTHOR:</b>	Daly [D]
	<b>TITLE:</b>	Unemployment Insurance: Coronavirus Pandemic
	<b>INTRODUCED:</b>	02/21/2020
	<b>LAST AMEND:</b>	05/04/2020
	<b>DISPOSITION:</b>	Failed - Adjourned
	<b>SUMMARY:</b>	Provides that following the termination of the Federal Pandemic Unemployment Compensation amount provided pursuant to the CARES Act, or any other federal supplemental unemployment compensation payments for unemployment due to the coronavirus pandemic, that an individual's weekly benefit amount be increased by a specified amount for the remainder of the duration of time the individual is entitled to receive benefits.

CA SB 89	<p><b>AUTHOR:</b> Budget and Fiscal Review Cmt  <b>TITLE:</b> Budget Act  <b>INTRODUCED:</b> 01/10/2019  <b>LAST AMEND:</b> 03/16/2020  <b>DISPOSITION:</b> Enacted  <b>SUMMARY:</b>  Amends the Budget Act to make appropriations for any purpose related to the proclamation of a state of emergency upon order of the Director of Finance; provides that the Administration will work with stakeholders, including members of the Legislature and staff, in developing strategies to be considered for inclusion to assist individuals, nonprofit organizations, and small businesses experiencing economic hardships to the impacts.</p>
CA SB 117	<p><b>AUTHOR:</b> Budget and Fiscal Review Cmt  <b>TITLE:</b> Education Finance  <b>INTRODUCED:</b> 01/10/2019  <b>LAST AMEND:</b> 03/16/2020  <b>DISPOSITION:</b> Enacted  <b>SUMMARY:</b>  Provides that due to the coronavirus, the instructional days and minutes requirements will be deemed to have been met during the period of time the school is closed. Extends the deadline to conduct the English learner assessment, unless otherwise determined by the Superintendent.</p>
CA SB 893	<p><b>AUTHOR:</b> Caballero [D]  <b>TITLE:</b> Workers' Compensation: Hospital Employees  <b>INTRODUCED:</b> 01/28/2020  <b>LAST AMEND:</b> 04/29/2020  <b>DISPOSITION:</b> Failed - Adjourned  <b>SUMMARY:</b>  Defines injury, for a hospital employee who provides direct patient care in an acute care hospital, to include infectious diseases, musculoskeletal injuries, and respiratory diseases. Creates rebuttable presumptions that these injuries that develop or manifest in a hospital employee who provides direct patient care in an acute care hospital arose out of and in the course of employment.  <b>Staff_Action:</b> Monitoring</p>
CA SB 939	<p><b>AUTHOR:</b> Wiener [D]  <b>TITLE:</b> Emergencies: Coronavirus: Evictions  <b>INTRODUCED:</b> 02/06/2020  <b>LAST AMEND:</b> 05/29/2020  <b>DISPOSITION:</b> Failed - Adjourned  <b>SUMMARY:</b>  Prohibits a commercial landlord from serving a specified notice of eviction on a commercial tenant under a certain number of days after the state of emergency proclaimed by the Governor on March 4, 2020, is lifted and if specified criteria apply. Defines eligible COVID 19 impacted commercial tenant. Provides that specified notices of eviction served on commercial tenants are void under specified circumstances.  <b>Staff_Action:</b> Monitoring</p>
CA SB 943	<p><b>AUTHOR:</b> Chang [R]</p>



**TITLE:** Paid Family Leave: Coronavirus  
**INTRODUCED:** 02/10/2020  
**LAST AMEND:** 05/19/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Authorizes wage replacement benefits to specified workers who take time off work to care for a child or other family member, including a child with disabilities, for whom the employee is responsible for providing care, if that person's school or place of care has been closed, or the care provider of that person is unavailable, due to the coronavirus outbreak.

**Staff\_Action:** Monitoring

CA SB 1159

**AUTHOR:** Hill [D]  
**TITLE:** Workers Compensation: Coronavirus: Critical Workers  
**INTRODUCED:** 02/20/2020  
**LAST AMEND:** 08/30/2020  
**DISPOSITION:** Enacted  
**SUMMARY:**

Amends existing law relating to the workers' compensation system. Defines injury for an employee to include illness or death resulting from coronavirus disease. Allows for a presumption of injury for all employees whose fellow employees at their place of employment experience specified levels of positive testing, and whose employer has five or more employees. Requires the Commission on Health and Safety and Worker's Compensation to conduct a COVID 19 impact study.

**Staff\_Action:** Monitoring

CA SB 1322

**AUTHOR:** Rubio [D]  
**TITLE:** Remote Online Notarization Act  
**INTRODUCED:** 02/21/2020  
**LAST AMEND:** 04/03/2020  
**DISPOSITION:** Failed - Adjourned  
**SUMMARY:**

Relates to Remote Online Notarization Act. Authorizes a notary public to apply for registration with the Secretary of State to be a remote online notary public. Provides that the act shall remain in effect only while there is a declaration of a state of emergency by the Governor related to the coronavirus in effect.

**Staff\_Action:** Monitoring

CA 40 2020

**Executive Order**  
**TITLE:** Coronavirus and Workers' Compensation Benefits  
**ORDERED:** 05/06/2020  
**SUMMARY:**

Provides that any coronavirus related illness of an employee shall be presumed to arise out of and in the course of employment for purposes of awarding workers' compensation benefits if the employee tested positive for or was diagnosed with coronavirus within fourteen days after a day that the employee performed labor or services at the employee's place of employment at the employer's direction after a specified date.

**Comments:**

Governor's Executive Order providing a presumption for workers' compensation benefits due to Covid-19. The order was subsequently codified in SB 1159 (Hill).



November 5, 2020

TO: State Association of County Retirement Systems

FROM: Mike Robson, Trent Smith, and Bridget McGowan, Edelstein Gilbert Robson & Smith, LLC

RE: **Legislative Update – November 2020**

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### **California Election Update**

California experienced what appears to be record voter turnout, with high early votes from Democrats and high day-of voting by Republicans. In past elections, late-mailed ballots and provisional ballots trended to the Democrats. It remains to be seen how many late ballots have yet to be counted and many races are too close and will be decided by these ballots.

### **State Senate**

The State Senate is currently comprised of 29 Democrats and 11 Republicans. The Democrats mounted well-funded challenges to four seats currently held by Republicans. It is likely the Republicans will lose at least two of these seats and maybe all four.

**SD 29 Senator Ling Ling Chang (R) vs. Josh Newman (D)** -- Newman ahead by 10,000 votes.

**SD 37 – Senator John Moorlach (R) vs. Dave Min (D)** – Min ahead by 11,000 votes.

**SD 23 – Rosilicie Ochoa Bogh (R) vs Abigail Medina (D)** –Medina ahead by 241 votes.

**SD21 – Senator Scott Wilk (R) vs. Kipp Mueller (D)** – Wilk up by 553 votes.

### **Assembly**

The Assembly is currently comprised of 61 Democrats, 17 Republicans, a vacancy and an independent.

The Assembly Democrats were defending three seats won from Republicans in 2018 and going after four seats held by Republicans. The Republicans picked up a Democratic seat when the Dems failed to place a candidate in the General Election.

It is highly likely the Democrats will succeed in defending their 2018 wins:

**AD 74 – Assemblymember Cottie Petrie-Norris (D) vs. Diane Dixon (R).**

**AD 76 – Assemblymember Tasha Boerner-Horvath (D) vs. Melanie Burkholder (R).**

**AD 77 – Assemblymember Brian Maienschein (D) vs. June Yang-Cutter (R).**

**AD 38 Suzette Valladares (R)** – Won. Pick up from Democrats.

At this moment the Republicans appear to be defending their seats:

**Assembly District 68 – Assemblymember Steven Choi (R) vs. Melissa Fox (D).** Choi is up by about 10,000 votes.

**Assembly District 72 – Janet Nguyen (R) vs. Deidre Nguyen (D).** Janet Nguyen is up by about 11,000 votes.

**Assembly District 55 – Assemblymember Phil Chen (R) vs. Andrew Rodriguez (D)** Phil Chen is up by about 14,000 votes.

**Assembly District 35 – Assemblymember Jordan Cunningham (R) vs. Dawn Addis (D)** Cunningham is up by about 13,000 votes.

### **Ballot Initiatives**

There were a dozen ballot initiatives on the statewide ballot.

Of particular interest to many members of SACRS is the still to-be-determined outcome of **Proposition 15** to increase property tax on commercial property. If passed, increased property taxes would bring an additional \$10-\$12 billion in new revenue to local governments and schools. Right now, this initiative is behind by about 400,000 votes and is still too close to call.

A common theme among the ballot fights is that the side that spent the most money prevailed. That was the case with **Proposition 22** put on the ballot by Uber, Lyft and other Gig economy businesses who spent at least \$250 million to pass this initiative. Similarly, dialysis clinics outspent the healthcare unions to defeat **Proposition 23**. Realtors and firefighters raised over \$45 million and are currently ahead in the effort to pass **Proposition 19**. While former Governor Brown and criminal justice reform advocates spent \$22 million to defeat **Proposition 20** to increase criminal penalties for certain crimes. Finally, property owners and landlords spent \$134 million to defeat **Proposition 21** which would have created a California rent-control law.

Interestingly, voters appear to be rejecting two measures placed on the ballot by their elected representatives and a third measure is passing that will overturning a law created by the Legislature. **Proposition 16** to overturn the ban on affirmative action programs in university admissions and government hiring and contracting is currently behind 44% to 56%.and will likely fail. **Proposition 18** to allow 17-year-olds to vote in primaries will also lose. Finally, **Proposition 25** is a referendum on a law passed by the Legislature that ended cash bail. With voters rejecting the Proposition 25, this law will be overturned.

### **Congress**

The Congressional Democrats were defending six seats won in 2018 and seeking an additional Republican seat.. Currently, many races are still too close to call.

CD 10 -- Harder (D) v Howze – Harder won

CD 21 -- Cox (D) 48.6% v Valadao 51.4% -- Too close to call

CD 25 -- Smith (D) 50.5% v. Garcia 49.5% – Too close to call  
CD 39 -- Cisneros (D) 49.8% v Kim 50.2% – Too close to call  
CD 45 -- Porter (D) v Raths – Porter won  
CD 48 -- Rouda (D) 49.7% v Steele 50.3% – Too close to call  
CD 49 -- Levin (D) v. Maryott – Levin won

**FOR INFORMATION ONLY**

November 18, 2020

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Ted Granger   
Interim Chief Financial Officer

FOR: December 2, 2020 Board of Retirement Meeting  
December 9, 2020 Board of Investments Meeting

SUBJECT: **MONTHLY EDUCATION & TRAVEL REPORTS – OCTOBER 2020**

Attached, for your review, are the Board and Staff Education & Travel Reports as of October 2020. These reports include travel (i.e., completed and canceled) during Fiscal Year 2020-2021.

REVIEWED AND APPROVED:



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Santos H. Kreimann  
Chief Executive Officer

TG/EW/krh

Attachments

c: J. Popowich  
J. Gabel  
S. Rice  
K. Hines

**BOARD EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
OCTOBER 2020**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Alan Bernstein</b>			
B	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
<b>Elizabeth Ginsberg</b>			
B	- Edu - CALAPRS Principles for Trustees - VIRTUAL	08/18/2020 - 08/26/2020	Attended
<b>Vivian Gray</b>			
B	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
	- Edu - Koried Black Directors' Virtual Workshop - VIRTUAL	10/15/2020 - 10/15/2020	Attended
<b>David Green</b>			
B	- Edu - PPI 2020 Summer Roundtable - Los Angeles CA	07/14/2020 - 07/16/2020	Attended
	- Edu - Pacific Council - "Beyond the Horizon" Summit - VIRTUAL	07/20/2020 - 07/24/2020	Attended
<b>Elizabeth Greenwood</b>			
B	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu - PPI 2020 Asia Pacific Roundtable - VIRTUAL	10/20/2020 - 10/22/2020	Attended
<b>James Harris</b>			
B	- Edu - SACRS Sexual Harassment Prevention Training - VIRTUAL	07/15/2020 - 07/15/2020	Attended
	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
<b>Shawn Kehoe</b>			
B	- Edu - PPI 2020 Asia Pacific Roundtable - VIRTUAL	10/20/2020 - 10/22/2020	Attended
<b>Keith Knox</b>			
B	- Edu - PPI 2020 Summer Roundtable - Los Angeles CA	07/14/2020 - 07/16/2020	Attended
	- Edu - SACRS Public Pension Investment Management Program 2020 - VIRTUAL	07/28/2020 - 08/13/2020	Attended
	- Edu - CII & NYU Corporate Governance Bootcamp - VIRTUAL	09/23/2020 - 09/25/2020	Attended
	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL	10/23/2020 - 10/23/2020	Attended
<b>Gina Sanchez</b>			
B	- Edu - SACRS Sexual Harassment Prevention Training - VIRTUAL	07/15/2020 - 07/15/2020	Attended
	- Edu - 2020 Milken Institute Virtual Global Conference - VIRTUAL	10/12/2020 - 10/21/2020	Attended
	- Edu - 2020 Virtual NACD Summit - VIRTUAL	10/12/2020 - 10/13/2020	Attended
	- Edu - CALAPRS Virtual Trustees Round Table - VIRTUAL	10/23/2020 - 10/23/2020	Attended



**BOARD EDUCATION AND TRAVEL REPORT**  
**FOR FISCAL YEAR 2020 - 2021**  
**OCTOBER 2020**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Herman Santos</b>			
B	- Edu- LAVCA's Annual Investor Meeting - VIRTUAL	09/14/2020 - 09/17/2020	Attended
	- Edu- PPI Virtual Equity, Diversity, and Inclusion Conversation - VIRTUAL	09/24/2020 - 09/24/2020	Attended
	- Edu - Nossaman's 2020 Public Pensions and Investments Fiduciaries' Forum - VIRTUAL	10/01/2020 - 10/01/2020	Attended

Category Legend:

A - Pre-Approved/Board Approved

B - Educational Conferences and Administrative Meetings in CA where total cost is no more than \$2,000 or international prerequisite conferences per 705.00 A. 8.

C - Second of two conferences and/or meetings counted as one conference per Section 705.00.A.1 in the Travel Policy

X - Canceled events for which expenses have been incurred.

Z - Trip was Canceled - Balance of \$0.00



**STAFF EDUCATION AND TRAVEL REPORT  
FOR FISCAL YEAR 2020 - 2021  
OCTOBER 2020**

<b>Attendee</b>	<b>Purpose of Travel - Location</b>	<b>Event Dates</b>	<b>Travel Status</b>
<b>Systems</b>			
Celso Templo	1 Admin - Conduct Site Visit of Mesa, AZ Facility - Mesa AZ	10/09/2020 - 10/09/2020	Attended





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**Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.**

**For further information, contact:  
LACERA  
Attention: Public Records Act Requests  
300 N. Lake Ave., Suite 620  
Pasadena, CA 91101**

**FOR INFORMATION ONLY**

November 18, 2020

TO: Trustees  
Board of Retirement  
Board of Investments

FROM: Ted Granger   
Interim Chief Financial Officer

FOR: December 2, 2020 Board of Retirement Meeting  
December 9, 2020 Board of Investments Meeting

**SUBJECT: 1ST QUARTER EDUCATION & TRAVEL EXPENDITURE REPORTS**

Attached, for your review, are the Board and Staff Education & Travel Reports and the Board Cancellation & Credit Expenditures Report as of September 2020. These include expenses paid or submitted for reimbursement for travel completed through the first quarter of Fiscal Year 2020-2021.

REVIEWED AND APPROVED:



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Santos H. Kreimann  
Chief Executive Officer

TG/EW/krh

Attachments

c: J. Popowich  
J. Grabel  
S. Rice  
K. Hines



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**For further information, contact:  
LACERA  
Attention: Public Records Act Requests  
300 N. Lake Ave., Suite 620  
Pasadena, CA 91101**



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**For further information, contact:  
LACERA  
Attention: Public Records Act Requests  
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Pasadena, CA 91101**