

# IN PERSON & VIRTUAL BOARD MEETING

**\*This meeting will be held following  
the Committee scheduled prior.**



**TO VIEW VIA WEB**



**TO PROVIDE PUBLIC COMMENT**

**Members of the public may address the Board orally and in writing. To provide Public Comment, please visit the above link and complete the request form.**

**Attention:** If you have any questions, you may email [PublicComment@lacera.com](mailto:PublicComment@lacera.com).

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

# AGENDA

## A REGULAR MEETING OF THE BOARD OF RETIREMENT

### LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., THURSDAY, JULY 10, 2025

*This meeting will be conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953 (f).*

*Any person may view the meeting in person at LACERA's offices or online at <https://LACERA.com/leadership/board-meetings>.*

*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. PLEDGE OF ALLEGIANCE
- III. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953 (f)
  - A. Just Cause
  - B. Action on Emergency Circumstance Requests
  - C. Statement of Persons Present at AB 2449 Teleconference Locations
- IV. APPROVAL OF THE MINUTES
  - A. Approval of the Minutes of the Regular Meeting of June 4, 2025
- V. PUBLIC COMMENT

(Members of the public may address the Board orally and in writing. To provide Public Comment, you should visit <https://LACERA.com/leadership/board-meetings> and complete the request [form](#).

If you select oral comment, we will contact you via email with information and instructions as to how to access the meeting as a speaker. You will have up to 3 minutes to address the Board. Oral comment requests will be accepted up to the close of the Public Comment item on the agenda.

V. PUBLIC COMMENT (Continued)

If you select written comment, please input your written public comment within the form as soon as possible and up to the close of the meeting. Written comment will be made part of the official record of the meeting. If you would like to remain anonymous at the meeting without stating your name, please leave the name field blank in the request form. If you have any questions, you may email [PublicComment@lacera.com](mailto:PublicComment@lacera.com).)

VI. EXECUTIVE UPDATE

- A. LACERA All Stars
- B. Member Spotlight
- C. Chief Executive Officer's Report

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

VIII. CONSENT ITEMS

A. **Ratification of Service Retirement and Survivor Benefit Application Approvals**

Recommendation that the Board approve the service retirements and survivor benefit applications received as of July 1, 2025, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated July 1, 2025)

B. **Dismiss with Prejudice the Appeal of Carlos H. Fernandez**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Carlos H. Fernandez's appeal for service-connected disability retirement. (Memo dated June 5, 2025)

C. **Dismiss with Prejudice the Appeal of Miguel A. Vega, Jr.**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Miguel A. Vega, Jr.'s appeal of LACERA's decision that all benefits accrued after April 13, 2020, are forfeited under Government Code sections 7522.72 and 7522.74. (Memo dated June 5, 2025)

VIII. CONSENT ITEMS (Continued)

D. **Appeal for the Board of Retirement's Meeting of July 10, 2025**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board grant the appeal(s) and request(s) for administrative hearing received from Scott W. Garrett and Genieve R. Atkinson and direct the Disability Retirement Services Manager to refer each case to a referee.

(Memo dated June 30, 2025)

E. **Service Provider Invoice Approval Request – Winet Patrick Gayer Creighton & Hanes**

Recommendation as submitted by Francis J. Boyd, Senior Staff Counsel, Legal Services: That the Board approve the service provider invoice for Winet Patrick Gayer Creighton & Hanes. (Memo dated June 24, 2025 – Attachment is Non-Public and Exempt from Disclosure as Private Information and Exempt from Disclosure under California Government Code Sections 7927.700, 54957.56(a))

IX. EXCLUDED FROM CONSENT ITEMS

X. NON-CONSENT ITEMS

A. **Mainframe Hosting Contract Renewal: Mainline Information Systems in Partnership with Data Management Inc.**

Recommendation as submitted by Kathy Delino, Chief, Information Technology Officer: That the Board authorize LACERA to renew our Contract for hosting LACERA's mainframe technology with Mainline Information Systems in partnership with Data Management Inc. at an annual cost of \$446,100 and a three-year cost of \$1,338,300.

(Memo dated June 24, 2025)

B. **Microsoft Contract Ratification (3-Year Renewal: FY 2025-28)**

Recommendation as submitted by Luis Lugo, Deputy Chief Executive Officer and Kathy Delino, Chief, Information Technology Officer: That the Board ratifies the LACERA Amendment to the Licensed Support Provider Agreement No. ITARC-00929 for Microsoft Products and Services Under Microsoft EA No. 8084445 between County of Riverside and Softchoice Corporation, executed on June 24, 2025, by Deputy Chief Executive Officer Luis A. Lugo. The total value of this agreement is \$2,169,190.37, distributed as follows: Year 1 –

X. NON-CONSENT ITEMS (Continued)

\$719,259.29, Year 2 - \$724,971.79, and Year 3 - \$724,959.29.  
(Memo dated June 24, 2025)

C. **Application of Kathleen M. Cady for Reinstatement to Active Membership Pursuant to Government Code Section 31680.4 and 31680.5**

Recommendation as submitted by Louis Gittens, Benefits Division Manager: That the Board 1) Determine, based upon the medical evaluation conducted on May 21, 2025 that Kathleen M. Cady is not incapacitated for the duties assigned to her in the position of Assistant Bureau Chief, DA; and 2) Grant the application of Kathleen M. Cady for reinstatement to active membership. (Memo date of June 27, 2025)

XI. REPORTS

A. **2025 STAR COLA Overview**

Ted Granger, Chief Financial Officer  
(Presentation) (Memo dated June 25, 2025)

B. **Report on Retired Annuitants Employed Under 960 Hour Requests for FY 2024-2025**

Luis Lugo, Deputy Chief Executive Officer  
(For Information Only) (Memo dated June 20, 2025)

C. **Contracting Activity Report – May 2025**

Ricki Contreras, Administrative Services Division Manager  
Elsy Gutierrez, Supervising Administrative Assistant II  
(For Information Only) (Memo dated June 24, 2025)

D. **Monthly Trustee Travel & Education Report – May 2025**

Ted Granger, Chief Financial Officer  
(For Information Only) (Memo dated June 27, 2025)

E. **Monthly Status Report on Legislation**

Barry W. Lew, Legislative Affairs Officer  
(For Information Only) (Memo dated June 25, 2025)

XI. REPORTS (Continued)

F. **June 2025 Fiduciary Counsel Contact and Billing Report**

Steven P. Rice, Chief Counsel

(For Information Only) (Memo dated June 24, 2025)

(Privileged and Confidential/Attorney-Client Communication/Attorney Work Product and Exempt from Disclosure under California Government Code Sections 7927.705, 54957.5(a))

XII. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

XIII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

XIV. GOOD OF THE ORDER

(For Information Purposes Only)

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

XVI. EXECUTIVE SESSION

A. **Conference Legal Counsel - Existing Litigation**

(Pursuant to Paragraph (1) of Subdivision (d) of California Government Code Section 54956.9)

1. Robert Renko v. Board of Retirement

Los Angeles Superior Court, Case No. 24STCV29322

XVII. ADJOURNMENT

***\*Although the meeting is scheduled for 9:00 a.m., it can start anytime thereafter, depending on the length of the Committee meeting preceding it.***

***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 Trustees 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 and will also be posted on [lacera.com](http://lacera.com) at the same time, [Board Meetings | LACERA](#).***

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

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., WEDNESDAY, JUNE 4, 2025

*This meeting was conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953(f).*

TRUSTEES PRESENT:

Les Robbins, Chair

Ronald Okum, Vice Chair

Shawn R. Kehoe, Secretary (Alternate Seventh Member)

Nancy Durazo

Bobbie Fesler

JP Harris (Alternate Retired)

Elizabeth Ginsberg

Aleen Langton

David Ryu

TRUSTEES ABSENT:

Jason E. Green

Wayne Moore

STAFF ADVISORS AND PARTICIPANTS

Luis A. Lugo, Deputy Chief Executive Officer

JJ Popowich, Assistant Executive Officer

STAFF ADVISORS AND PARTICIPANTS (Continued)

Laura Guglielmo, Assistant Executive Officer

Jonathan Grabel, Chief Investment Officer

Jude Perez, Deputy Chief Investment Officer

Steven P. Rice, Chief Counsel

Dr. Glenn Ehresmann, Medical Advisor

Francis J. Boyd, Senior Staff Counsel

Allison Barrett, Senior Staff Counsel

Tamara Caldwell, Disability Retirement Manager

Carly Ntoya, Human Resources Director

Louis Gittens, Benefits Division Manager

Joe Rice, Managing Director, CBIZ Talent and Compensation

I. CALL TO ORDER

The meeting was called to order by Chair Robbins at 9:02 a.m. in the Board Room of Gateway Plaza.

II. PLEDGE OF ALLEGIANCE

Trustee Harris led the Trustees and staff in reciting the Pledge of Allegiance

III. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER AB 2449, California Government Code Section 54953(f)

A. Just Cause

B. Action on Emergency Circumstance Requests

C. Statement of Persons Present at AB 2449 Teleconference Locations

There was nothing to report. No trustees participated under Section 54953(f).

#### IV. APPROVAL OF THE MINUTES

##### A. Approval of the Minutes of the Regular Meeting of May 7, 2025

Trustee Langton made a motion, Trustee Kehoe seconded, to approve the minutes of the Regular Meeting of May 7, 2025. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

#### V. PUBLIC COMMENT

Member Robert Renko addressed the Board regarding his disability retirement application. Member Gustavo Mojarro addressed the Board regarding errors in his benefits and salary adjustments.

#### VI. EXECUTIVE UPDATE

##### A. Awards

Mr. Popowich recognized the graduates who have successfully completed the Specialist Basic Training Class.

##### B. LACERA All Stars

Mr. Popowich announced the winners for the month: Rachel Figueroa, Dana Jones, Amanda Aguayo, and Artur Asatryan. The Web Watcher winner was Wenona Myers and the Rideshare winner was Judy Tran.

##### C. Member Spotlight

Mr. Popowich recognized LACERA member, Michael Hedgecock.

##### D. Chief Executive Officer's Report

Mr. Lugo provided a brief presentation on the Chief Executive Officer's Report and answered questions from the Board.

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement  
Service-Connected Disability Applications

On a motion by Trustee Kehoe, seconded by Trustee Okum, the Board of Retirement approved a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

<u>APPLICATION NO.</u>	<u>NAME</u>
652E	GALVEZ, GONZALO (DEC'D)
653E*	SCROGGIN, SANDI
654E	MORROW, TRAVIS
655E	ROW, MICHAEL S.
656E	TWEEDY, RANDY L.
657E*	CAMARILLO, DEAN A.
658E	AIMAQ, SALIM S.
659E	GREENE, BENJAMIN I.
660E	BENITEZ, PATRICIA
661E**	ROYAL, JAMES P.
662E	GARCIA, JESUS T.
663E	HANSON, BRETT A.
664E	THOMPSON, MICHAEL A.
665E	BARNES, JOSHUA M.
666E	CANFIELD, RICHARD R.
667E	ORTEGA, JAIME
668E	LOPEZ, JORGE L.
669E	ESQUIVEL, SALVADOR, JR.
670E	LASCANO, BETTY B.
671E	SUTTON, ELIZABETH
672E	KOTSIK, GEORGE
673E	CARUSO, ANGELA M.
674E	BRUNER, LAURA C.
675E	FERRONE, TIMOTHY M.
676E	KEHOE, BRIAN A.
677E*	FORNESS, MATTHEW S.
678E***	TORRES, JONATHAN R. (DEC'D)

\*Granted SCD – Retroactive

\*\*Granted SCD – Employer Cannot Accommodate

\*\*\*Granted SCD – Survivor Benefit

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued)  
Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
679E	MORENO, STEPHEN G.
680E	STAMBOOK, JONATHAN E.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

Safety Fire, Lifeguards  
Service-Connected Disability Applications

On a motion by Trustee Okum, seconded by Trustee Langton, the Board of Retirement approved a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

<u>APPLICATION NO.</u>	<u>NAME</u>
1956B	FENNER, CHRISTOPHER W.
1957B	WORKING, PHILLIP V.
1958B	MENDOZA, ROBERT R.
1959B	SMITSON, LANCE E.
1960B	OHARA, KEVIN
1961B	WATSON, PATRICK B.
1962B	SHEPPARD, DANIEL W.
1963B*	MACKEY, ANDERSON D., JR.
1964B	RASH, CHRISTOPHER S.
1965B*	GRIGSBY, SCOTT

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

\*Granted SCD – Retroactive

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Service-Connected Disability Applications

On a motion by Trustee Okum, seconded by Trustee Langton, the Board of Retirement made a motion to approve a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

<u>APPLICATION NO.</u>	<u>NAME</u>
2934C*	POTECHIN, MICHAEL A. (DEC'D)
2935C**	BRAY, JAMES D.
2936C**	MAC PHERSON, MICHAEL L.
2937C	ROBERTS, GARY T.
2938C***	THOMAS, DEAUNDRE T.
2939C	APPLEWHITE, DEMETRA R.
2940C****	RIVAS, JOSE S.
2941C	HERRERA, LEDVIA C.
2942C***	PEREZ, SONIA E.
2943C****	BROWN-WILLIAMS, SHERI L.
2944C	MORLEY, CHARLENE L.
2945C	SKAHILL, SEAN M.
2946C**	MOORE, RUSSELL
2947C***	STEWART-NORTH, SHIRLENE
2948C****	BARNES, GEORGIA L.
2949C	LE, IRENE T.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

\*Granted SCD – Survivor Benefit

\*\*Granted SCD – Employer Cannot Accommodate

\*\*\*Granted SCD – Salary Supplement

\*\*\*\*Granted SCD – Retroactive Employer Cannot Accommodate

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Nonservice-Connected Disability Applications

On a motion by Trustee Okum, seconded by Trustee Langton, the Board of Retirement made a motion to approve a nonservice-connected disability retirement for the following named employee who met the burden of establishing permanent incapacity from the performance of her usual duties.

<u>APPLICATION NO.</u>	<u>NAME</u>
4512	DEDIOS, GLENN ALDRIN
4513*	REEFER, LIDIA E.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

VIII. CONSENT ITEMS

Trustee Kehoe made a motion, Trustee Okum seconded, to approve consent items A-C. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

**A. Ratification of Service Retirement and Survivor Benefit Application Approvals**

Recommendation that the Board approve the service retirements and survivor benefit applications received as of May 27, 2025, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated May 27, 2025)

\*Granted NSCD – Retroactive

VIII. CONSENT ITEMS (Continued)

**B. Appeals for the Board of Retirement Meeting of June 4, 2025**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board grant the appeals and requests for administrative hearing received from Rhonda Garnett and Theresa A. Schell, and direct the Disability Retirement Services Manager to refer each case to a referee.

(Memo dated May 22, 2025)

**C. Service Provider Invoice Approval Request – Jesse Carr, M.D.**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board approve the service provider invoice for Jesse Carr, M.D. (Memo dated May 8, 2025 – Attachment is Non-Public and Exempt from Disclosure as Private Information and Exempt from Disclosure under California Government Code Sections 7927.700, 54957.56(a))

IX. EXCLUDED FROM CONSENT ITEMS

There were no items pulled for discussion.

X. NON-CONSENT ITEMS

**A. Request to Ratify Labor Negotiator – Irma Rodriguez Moisa**

Recommendation as submitted by Carly Ntoya, Ph.D., Human Resources Director: That the Board ratify Irma Rodriguez Moisa to serve as LACERA's Chief Negotiator for upcoming negotiations with Service Employees International Union (SEIU) Local 721 for two Memoranda of Understanding (MOU) LACERA Administrative, Technical, Clerical, and Blue Collar Unit 850 and LACERA Supervisory Unit 851, starting in July 2025. (Memo dated May 21, 2025)

Ms. Ntoya was present and answered questions from the Board.

Trustee Kehoe made a motion, Trustee Langton seconded, to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

X. NON-CONSENT ITEMS (Continued)

B. **Ratification of Reciprocal Disability Retirement**

Recommendation as submitted by Louis Gittens, Benefits Manager: That the Board approve the reciprocal disability retirement for deferred members, Fel M. Sarno and Tracee E. Walker, 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 May 23, 2025)

Trustee Langton made a motion, Trustee Harris seconded, to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

C. **MOVED TO EXECUTIVE SESSION**

This item was held in Executive Session.

D. **Application of Joel Koury for Reinstatement to Active Membership Pursuant to Government Code Section 31680.4 and 31680.5**

Recommendation as submitted by Louis Gittens, Benefits Manager: That the Board 1) Determine, based upon medical evaluation conducted April 9, 2025, that Joel Koury is not incapacitated for the duties assigned to him in the position of Court Commissioner; and 2) Grant the application of Joel Koury for reinstatement to active membership. (Memo dated May 8, 2025)

Trustee Okum made a motion, Trustee Harris seconded, to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

XI. REPORTS

A. **Salary Adjustments for Investment Office Staff Members**

Luis Lugo, Deputy Chief Executive Officer  
Joe Rice, Managing Director, CBIZ Talent and Compensation Solutions. (Presentation) (Memo dated May 28, 2025)

Mr. Lugo and Mr. Rice of CBIZ Talent and Compensation Solutions provided a presentation and answered questions from the Board.

This item was received and filed.

B. **Los Angeles County's Compliance with Requirements for Rehired Retirees – Fiscal Year Ended June 30, 2024**

Debbie Martin, 2024 Audit, Compliance, Risk and Ethics Committee Chair  
Richard P. Bendall, Chief Audit Executive  
Steven P. Rice, Chief Counsel  
(For Information Only) (Memo dated May 27, 2025)

This item was received and filed.

C. **Assembly Bill 1383 – Public Employees' Retirement Benefits**

Barry W. Lew, Legislative Affairs Officer  
(For Information Only) (Memo dated May 23, 2025)

This item was received and filed.

D. **Report of Revised Pay Item**

Jean J. Kim, Senior Staff Counsel  
Zack Meth, Staff Counsel  
(For Information Only) (Memo dated May 9, 2025)

This item was received and filed.

E. **Contract Activity Report – March 2025**

Ricki Contreras, Administrative Services Division Manager  
Elsy Gutierrez, Supervising Administrative Assistant II  
(For Information Only) (Memo dated May 19, 2025)

This item was received and filed.

XI. REPORTS (Continued)

F. **Monthly Status Report on Legislation**

Barry W. Lew, Legislative Affairs Officer

(For Information Only) (Memo dated May 21, 2025)

This item was received and filed.

G. **Monthly Trustee Travel & Education Report – April 2025**

**Fiscal Year 2024-2025 3<sup>rd</sup> Quarter Trustee Travel & Education Expenditure Report**

**Fiscal Year 2024-2025 3<sup>rd</sup> Quarter Staff Travel Expenditure Report**

Ted Granger, Chief Financial Officer

(For Information Only) (Memo dated May 22, 2025)

This item was received and filed.

H. **May 2025 Fiduciary Counsel Contact and Billing Report**

Steven P. Rice, Chief Counsel

(For Information Only) (Memo dated May 27, 2025)

(Privileged and Confidential/Attorney-Client Communication/Attorney Work Product and Exempt from Disclosure under California Government Code Sections 7927.705, 54957.5(a))

This item was received and filed.

XII. ITEMS FOR STAFF REVIEW

Trustee Kehoe requested that staff provide an update regarding Robert Renko and Gustavo Mojarro's public comments.

XIII. ITEMS FOR FUTURE AGENDAS

There was nothing to report.

XIV. GOOD OF THE ORDER

(For Information Purposes Only)

Mr. Rice introduced new legal interns, Jasmine Feng and Aparajita Pathak. Lastly, Mr. Lugo announced that Bonnie Nolley was promoted to the Special Assistant Position in the Executive Office.

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME AND BOARD ACTION

5458B – WILLIAMS, ANTHONY\*

Trustee Kehoe made a motion, Trustee Okum seconded, to deny a service-connected disability retirement since the employer can accommodate.

Trustee Langton made a substitute motion, to grant a service-connected disability retirement. The motion failed due to a lack of a second on the motion.

Trustee Kehoe made a substitute motion, Trustee Robbins seconded, to return to staff for further development.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

5459B – BEASLEY, TERRY, II\*

Trustee Kehoe made a motion, Trustee Langton seconded, to grant a nonservice-connected supplemental disability allowance pursuant to Government Code Sections 31720 and 31725.5.

Trustee Kehoe made a substitute motion, Trustee Okum seconded to return to staff for further development.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

\*Applicant and/or Applicant's Attorney Present

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

APPLICATION NO. & NAME AND BOARD ACTION

5460B – MOORE, MICHAEL L.

This item was pulled by staff for further development.

5285B – ATKINSON, GENIEVE R.

Trustee Kehoe made a motion, Trustee Robbins seconded, to deny a service-connected disability retirement since the employer can accommodate.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

5443B – SANTIAGO, MELVIN M.\*

Trustee Kehoe made a motion, Trustee Robbins seconded, to grant a service-connected disability retirement pursuant to Government Code Section 31720.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

\*Applicant and/or Applicant's Attorney Present

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

APPLICATION NO. & NAME AND BOARD ACTION

5449B – HARRIS, PEGGY D.\*

Trustee Okum made a motion, Trustee Langton seconded, to deny a service-connected disability retirement and find the applicant ineligible for a nonservice-connected disability retirement.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

5451B – MARAVEL, ANDREW, L.\*

Trustee Kehoe made a motion, Trustee Robbins seconded, to grant a service-connected disability retirement pursuant to Government Code Sections 31720 and 31720.5.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

B. Disability Retirement Appeals

APPLICATION NO. & NAME AND BOARD ACTION

ZENDEL, ARLENE S. – Thomas Wicke for the Applicant  
Eugenia W. Der for the Respondent

Trustee Kehoe made a motion, Trustee Robbins seconded, to grant a service-connected disability retirement.

The motion passed by the following roll call vote:

\*Applicant and/or Applicant's Attorney Present

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

B. Disability Retirement Appeals

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

APPLICATION NO. & NAME AND BOARD ACTION

WILKES, PHILIP, D.\* – In Pro Per  
Jason Waller for the Respondent

Trustee Kehoe made a motion, Trustee Okum seconded, to deny a service-connected disability retirement and to grant a nonservice-connected disability retirement.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Kehoe, Langton, Okum, Robbins, Ryu

Absent: Moore

XVI. EXECUTIVE SESSION

A. **Conference Legal Counsel - Existing Litigation**

(Pursuant to Paragraph (1) of Subdivision (d) of California Government Code Section 54956.9)

1. *LACERA v. Marquez*

Los Angeles Superior Court, Case No. 25NNCV03240

There was nothing to report.

B. **Conference with Labor Negotiators**

(Pursuant to California Government Code Section 54957.6)

Agency Designated Representatives:

XVI. EXECUTIVE SESSION (Continued)

Chief Negotiator Irma Rodriguez Moisa, Carly Ntoya, Luis Lugo, Laura Guglielmo, JJ Popowich, Annette Cleary, and Jasmine Bath

Employee Organization: SEIU Local 721

There was nothing to report.

C. **Potential Threats to Public Services or Facilities**

(Pursuant to Subdivision (a) of California Government Code Section 54957)

Consultation with: LACERA Chief Executive Officer Deputy Chief Executive Officer, Luis Lugo, Assistant Executive Officers, JJ Popowich and Laura Guglielmo, Chief Information Technology, Kathy Delino, Information Security Officer, Chaitanya Errande, and other LACERA Staff.

There was nothing to report.

D. **Conference with Legal Counsel - Anticipated Litigation**

(Significant Exposure to Litigation Pursuant to Paragraph (2) of Subdivision (d) of California Government Code Section 54956.9)

One Item: Louis Rotar, Jr.

On a motion by Trustee Kehoe, seconded by Trustee Robbins the Board voted to change the member's retirement date to May 22, 1985 and waive the overpayment that would otherwise have been due. Trustees Durazo, Fesler, Kehoe, Langton, Okum, Robbins, and Ryu voted yes. Trustee Ginsberg and Moore were absent for the vote.

XVII. ADJOURNMENT

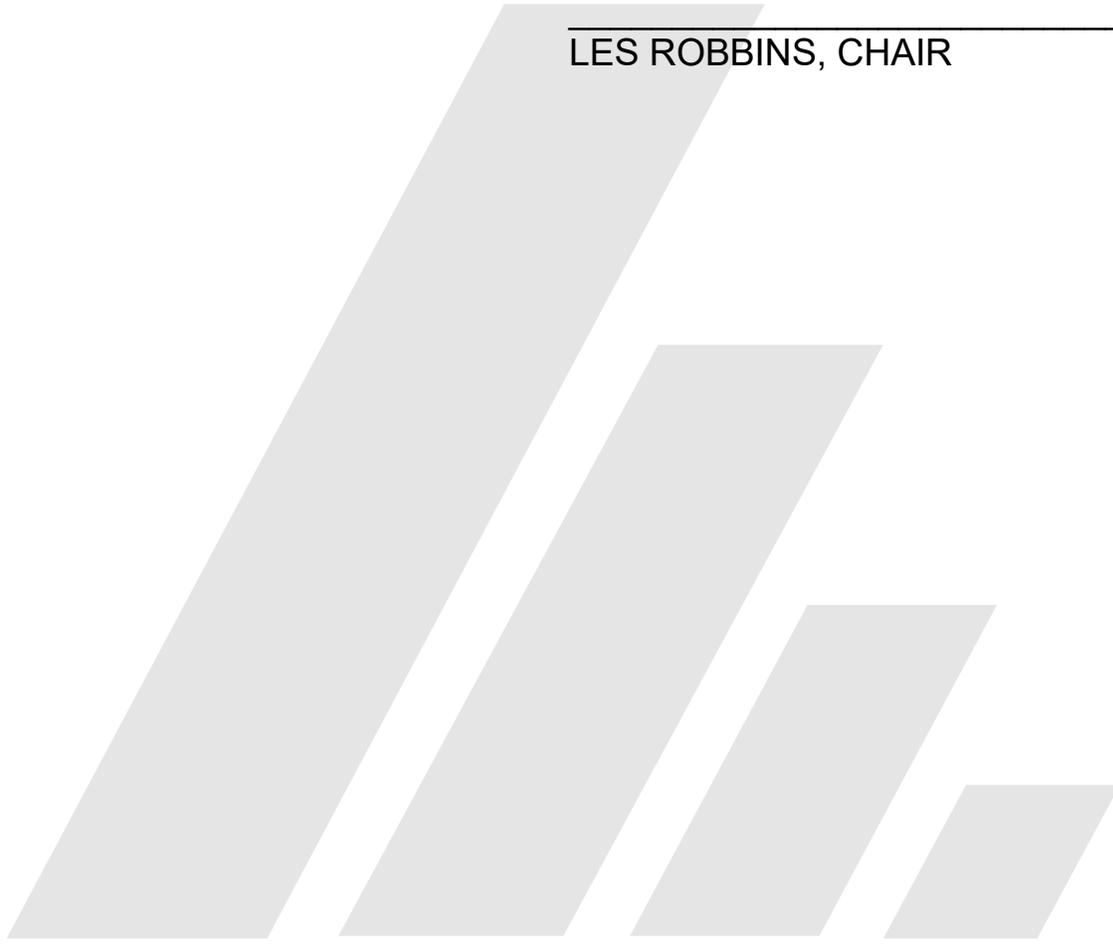
There being no further business to come before the Board, the meeting was adjourned at 12:52 p.m.

---

SHAWN R. KEHOE, SECRETARY

---

LES ROBBINS, CHAIR





# Recognizing Our Members' Service and Accomplishments

LACERA has nearly 100,000 active members working in dozens of L.A. County departments, many of whom dedicate their entire working lives to serving the community. Meet one of our long-serving members who is on the road to retirement.



Pre-Retiree Member

# Alicia E. Lozano

Senior Secretary V, County Counsel

Years of Service: 17

**Notable Contributions:** Alicia Lozano is planning to retire in 2027 after dedicating nearly 20 years of service to L.A. County. As a committed leader, Alicia takes great pride in the meaningful work her team does, especially in supporting older adults and individuals with mental health challenges.

**Advice to Others:** *“Learn as much as you can and always respect others.”*

**Interests & Hobbies:** Loves mediterranean food, reading murder mystery books, and travelling.

**Retirement Plans:** Traveling the world and spending more time with her family, including her dog Simba.

MEMBER SPOTLIGHT





July 1, 2025

TO: Each Trustee,  
Board of Retirement  
Board of Investments

FROM: Luis A. Lugo   
Deputy Chief Executive Officer

**SUBJECT: CHIEF EXECUTIVE OFFICER'S REPORT – JULY 2025**

The following Chief Executive Officer's Report highlights key operational and administrative activities that have taken place during the past month.

### **LACERA Summit**

We are excited to announce that LACERA will host its first in-person all-hands staff meeting and luncheon in September 2025. This event, previously called "The Forum" has been re-branded "The Summit" to reflect its objective to allow everyone at LACERA to come together to discuss our organizational goals, strategies and values, and to recognize our team members who have helped us reach ever higher. The program's theme is "Values in Action," reinforcing the importance of our behaviors and actions in the successful achievement of our mission –To produce, protect, and provide the promised benefits to our members.

The Summit will be held on Thursday, September 18, 2025, at Lake Avenue Church. Trustees are encouraged to attend. The Member Service Center and Call Center will be closed from 9:00 a.m. to 1:00 p.m. on this date to ensure that all staff can attend together. This convening is especially important in a hybrid work environment, as many team members have never met one another. Advanced notification of this temporary closure will be posted on our website, on the screens in the Member Services Center, and via a recorded message for all callers.

### **Board of Retirement (BOR) Strategic Planning Update**

Within this month's Operations Oversight Committee's (OOC) materials, you'll notice LACERA's strategic planning quarterly report. We are pleased to share that the team has successfully completed over 53% of the milestone tasks outlined in the Board of Retirement's (BOR) strategic planning work plans. This marks a significant achievement and underscores our collective dedication to continuous improvement and forward momentum.

As we continue to progress on strategic initiatives, we remain focused on thoughtful execution, performance tracking, and responsive adaptation to ensure each step brings us closer to fulfilling the BOR's long-term objectives.

## **Investing in People**

In June, LACERA met one of its most challenging milestones under our Strategic Goal 3.3, Improving and Simplifying the Hiring Process, achieving an organizational vacancy rate of 15 percent. Our success in this area is due to the collaboration between Human Resources and every other LACERA Division in following our Hiring Manager Playbook, designed to ensure a consistent, equitable, inclusive, and compliant process to attract, hire and promote the best talent available. While this is the lowest vacancy rate that LACERA has had in the past five years, we will continue to challenge ourselves to do even better. The Team has set a new goal to achieve an organizational vacancy rate of 13 percent by June 30, 2026. Additional details on Strategic Goal 3.3 are included in the BOR strategic plan status update report provided to the Operations Oversight Committee on July 10, 2025.

## **LACERA Safety Member Election Update**

There are no new updates regarding the pending Safety Member election to fill the Seventh Member and Alternate Safety Member of the Board of Retirement and the Fourth Member of the Board of Investments. LACERA and the BOS Executive Office have sent out notices to all eligible members with information on how they can get more information about filing to run in the election. The Candidate Filing Period ends on June 23, 2025, and we expect the Registrar-Recorder to certify the eligible candidate list by June 27, 2025.

## **Retiree Healthcare**

### *Anthem Lifetime Maximum Benefit (LMB) Update*

Effective July 1, 2025, the Anthem Blue Cross I, II and Prudent Buyer plans lifetime maximum benefit (LMB) will be increasing from \$1M to \$1.5M.

As we look towards the next health plan renewal cycle (effective July 1, 2026), LACERA has already engaged the County of Los Angeles CEO's office in increasing or eliminating the Lifetime Maximum Benefit (LMB). We will update the Board of Retirement (BOR) on our progress.



# CEO DASHBOARD



July 10, 2025

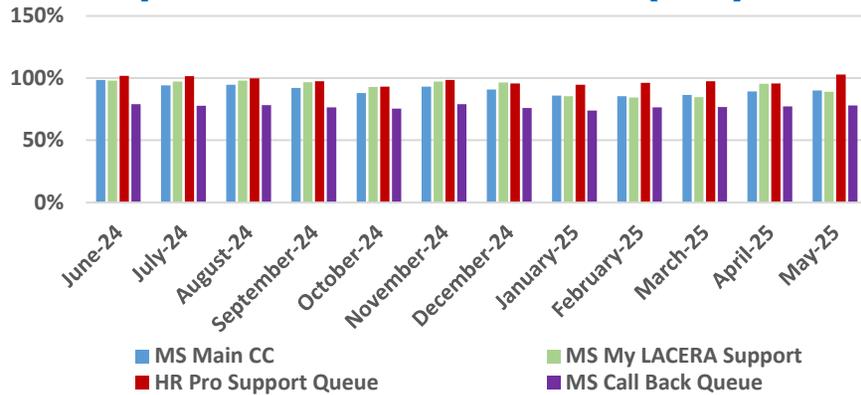


# Striving for Excellence

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

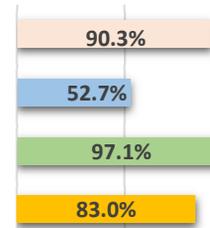
<b>Events / Webinar Attendance</b> Current Mo.: <b>1,237</b> Year-to-Date: 18,762	<b>Events / Webinar</b> Current Mo.: <b>23</b> Year-to-Date: 270	<b>Webinar Satisfaction</b> 1-5 Point Scale <b>4.3</b>	<b>Member Service Center Satisfaction</b> <b>97.21%</b>	<b>MS Main Queue Total Calls</b> Current Mo. <b>7,924</b> 3 Month Avg. 8,790				
					Resp. Rate	Change	Resp. Rate	Change
					49.8%	-0.20%	18.3%	-1.18%

## Member Service Call Center Queue Key Performance Indicators (KPI)

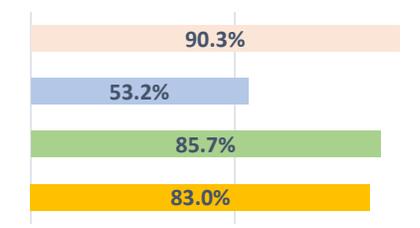


## Key Performance Indicator (Components by Queue)

### MSCC Main Queue



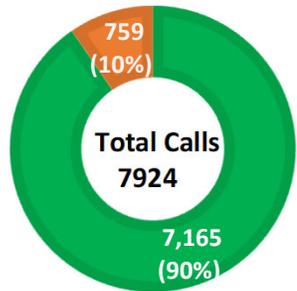
### My LACERA Support Queue



Member Services

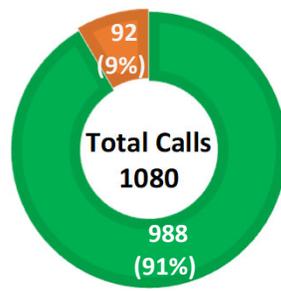
### MSCC MAIN OUEUE

■ Calls Answered ■ Calls Abandoned



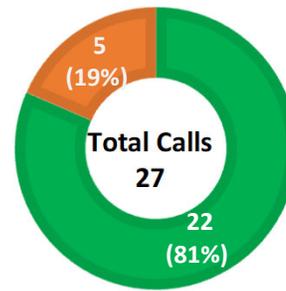
### MY LACERA SUPPORT

■ Calls Answered ■ Calls Abandoned



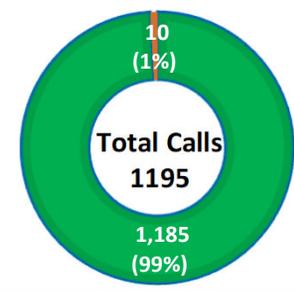
### HR PRO SUPPORT

■ Calls Answered ■ Calls Abandoned



### MS CALL BACK OUEUE

■ Calls Answered ■ Calls Abandoned



Queue KPI:	90.00%	Queue KPI:	88.90%	Queue KPI:	102.70%	Queue KPI:	78.04%
Avg. Speed of Answer	Average Duration						
0:05:00	0:16:25	0:02:27	0:12:38	0:00:40	0:13:39	0:09:26	0:14:02



# Striving for Excellence

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

## TOP REASONS MEMBERS CONTACT MEMBER SERVICES

### Member Services Call Center

### Member Service Center (Outreach)

1. Retirement Counseling

1. Retirement Counseling

2. Taxes

2. RHC

3. Benefit Payments

3. Workshops/Appointments

## Contact Center Email/Secure Message Performance



Emails (welcome@lacera.com):

370

Service Level: 24 Bus. Hours

On Target



Secure Message (My LACERA)

1,025

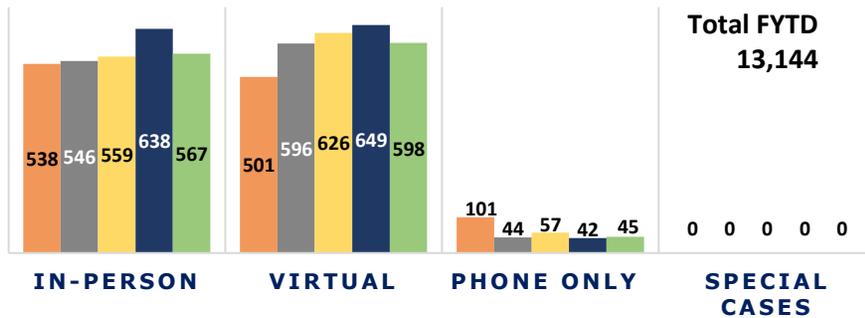
Service Level: 24 Bus. Hours

On Target

## Member Service Center (Outreach)

### Member Service Center Appointments

January February March April May



### Members Served in Webinars/Workshops



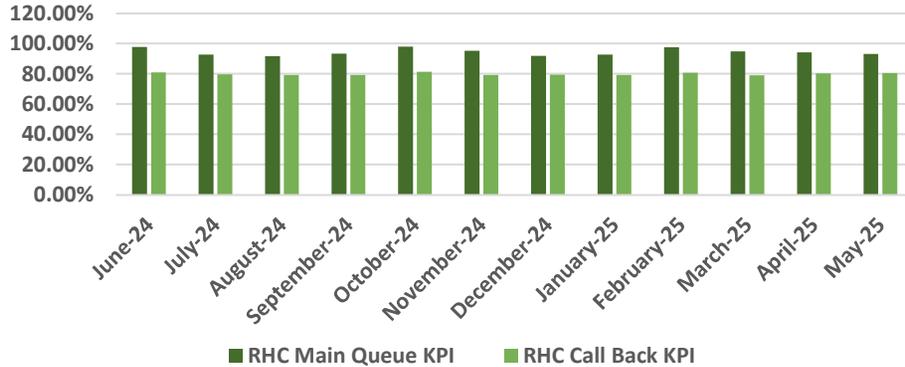
Member Services



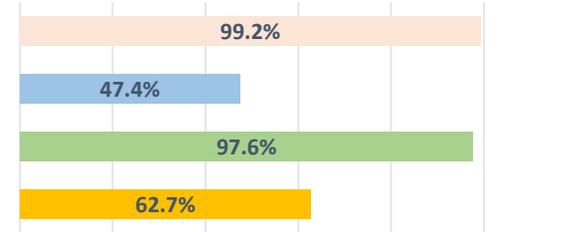
# Striving for Excellence

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

## RHC Call Center Queue Key Performance Indicator (KPI)



## Key Performance Indicator (Components by Queue) Main RHC Call Center Queue

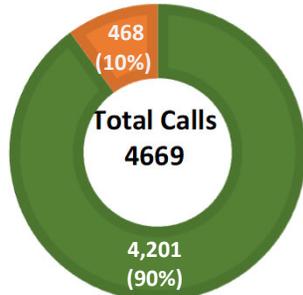


Agent Utilization (Goal:65%)	Grade of Service (Goal: 80% in 60 sec)
After Call Survey (Goal: 90%)	Call Monitoring (Goal: 95%)

Retiree Healthcare

### RHC MAIN QUEUE

■ Calls Answered ■ Calls Abandoned

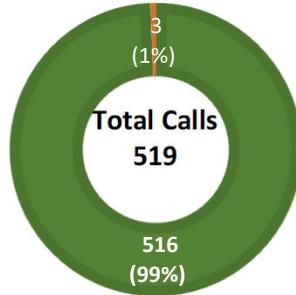


Queue KPI: 93.00%

Avg. Speed of Answer	Average Duration
0:06:25	0:13:28

### RHC CALL BACK QUEUE

■ Calls Answered ■ Calls Abandoned



Queue KPI: 80.50%

Avg. Speed of Answer	Average Duration
0:26:11	0:10:23

### TOP RHC CALL TOPICS

1. New Carrier Rates

2. Medical/Dental Enrollments

3. Medicare Part B

### RHC Email/Secure Message Performance



Emails (healthcare@lacera.com): 387

Service Level: 24 Bus. Hours

On Target



Secure Message (My LACERA) 633

Service Level: 24 Bus. Hours

On Target



# Striving for Excellence

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

Disability

## Applications

1,053

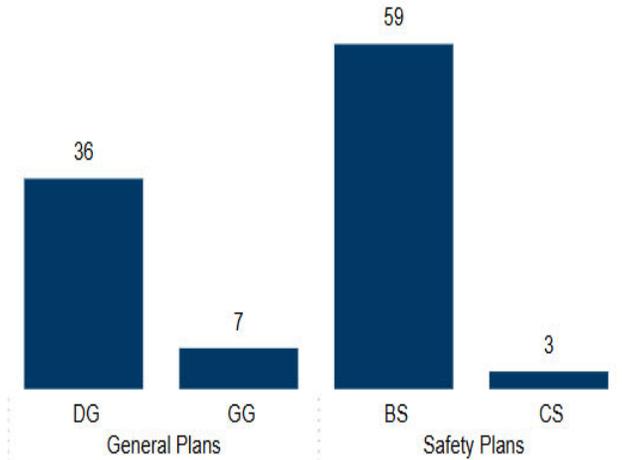
105	Received: New Applications
877	Received Year-to-Date
68	Pending: Applications in Process
68	To Board - Initial (Presented to BOR)
557	To Board - Initial Year-to-Date
13	Closed (Incomplete/Withdrawn)
182	Closed Year-to-Date

## Appeals

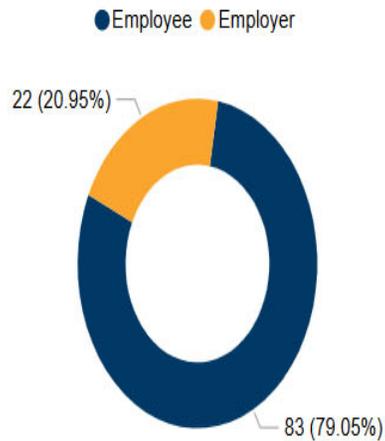
56

0	Received: New Appeals
13	Received Year-to-Date
1	Pending: Appeals in Process
1	Admin Closed
14	Admin Closed Year-to-Date
1	Referee Recommendations
9	Referee Recommendations Year-to-Date
0	DLO Recommendations
0	DLO Recommendations Year-to-Date

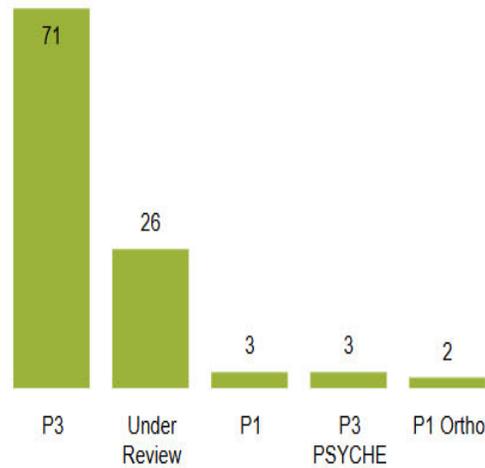
## Applications Filed by Plan



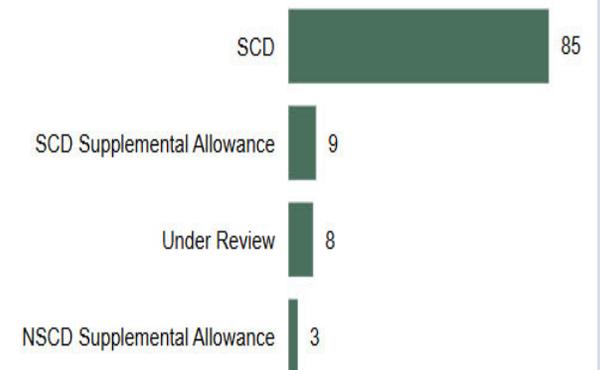
## Applications Filed by Source



## Applications Filed by Priority Level



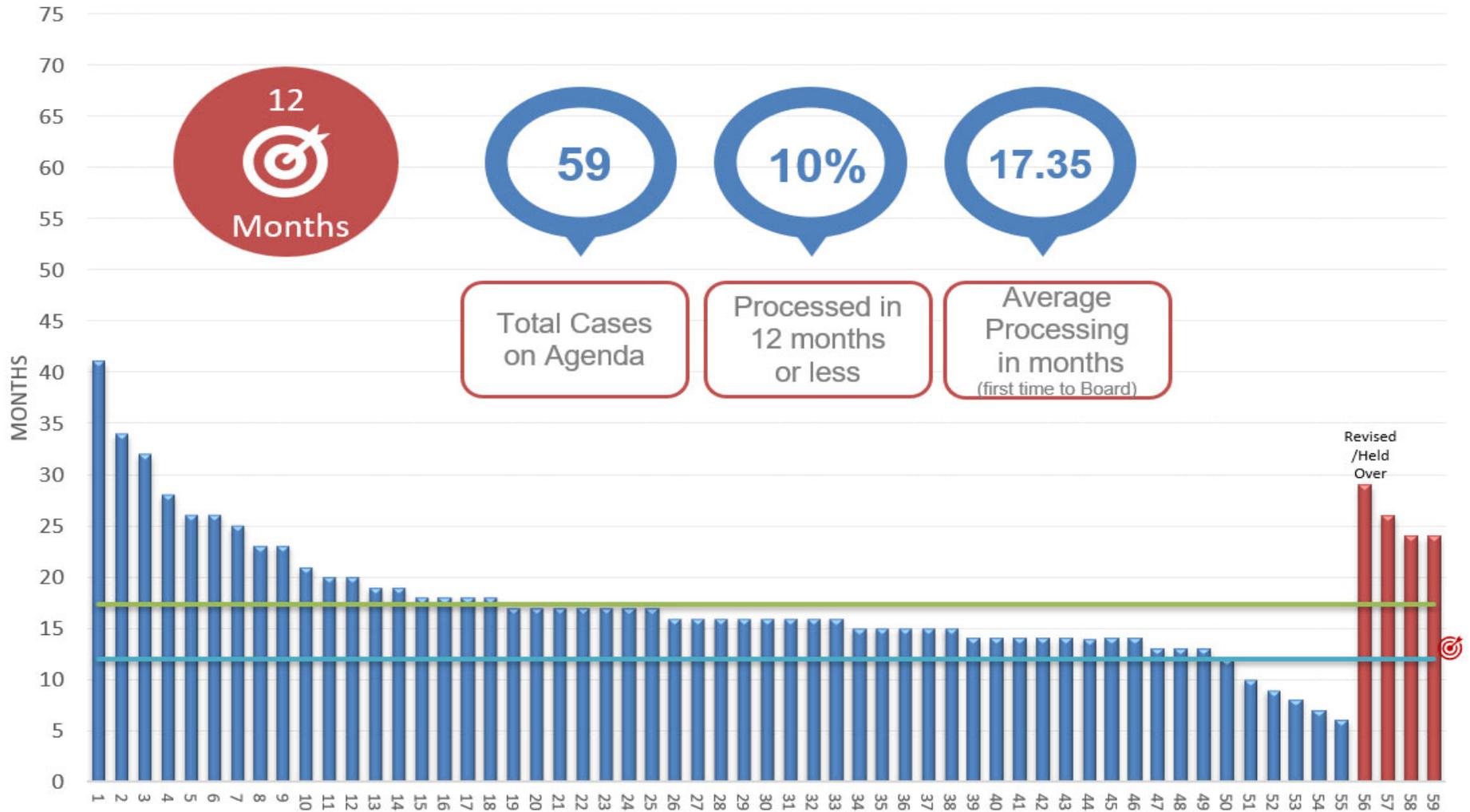
## Applications Filed by Type





### DISABILITY RETIREMENT SERVICES Application Processing Time

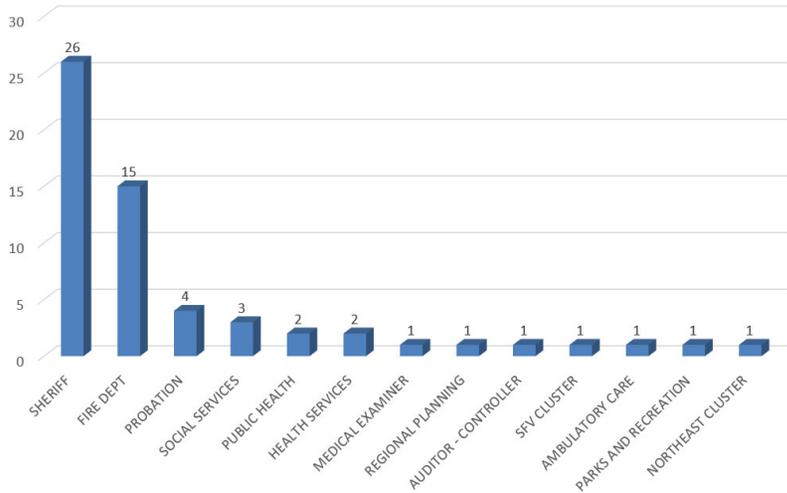
Disability



July 10, 2025 - Disability Agenda



**DISABILITY RETIREMENT SERVICES**  
**Total Applications by Department on July 10, 2025 Agenda**



**1046**  
 Total Pending Applications



As of June 25, 2025

\*Cases on the July 10, 2025 agenda are not included

Disability Retirement Services

Applications by Department

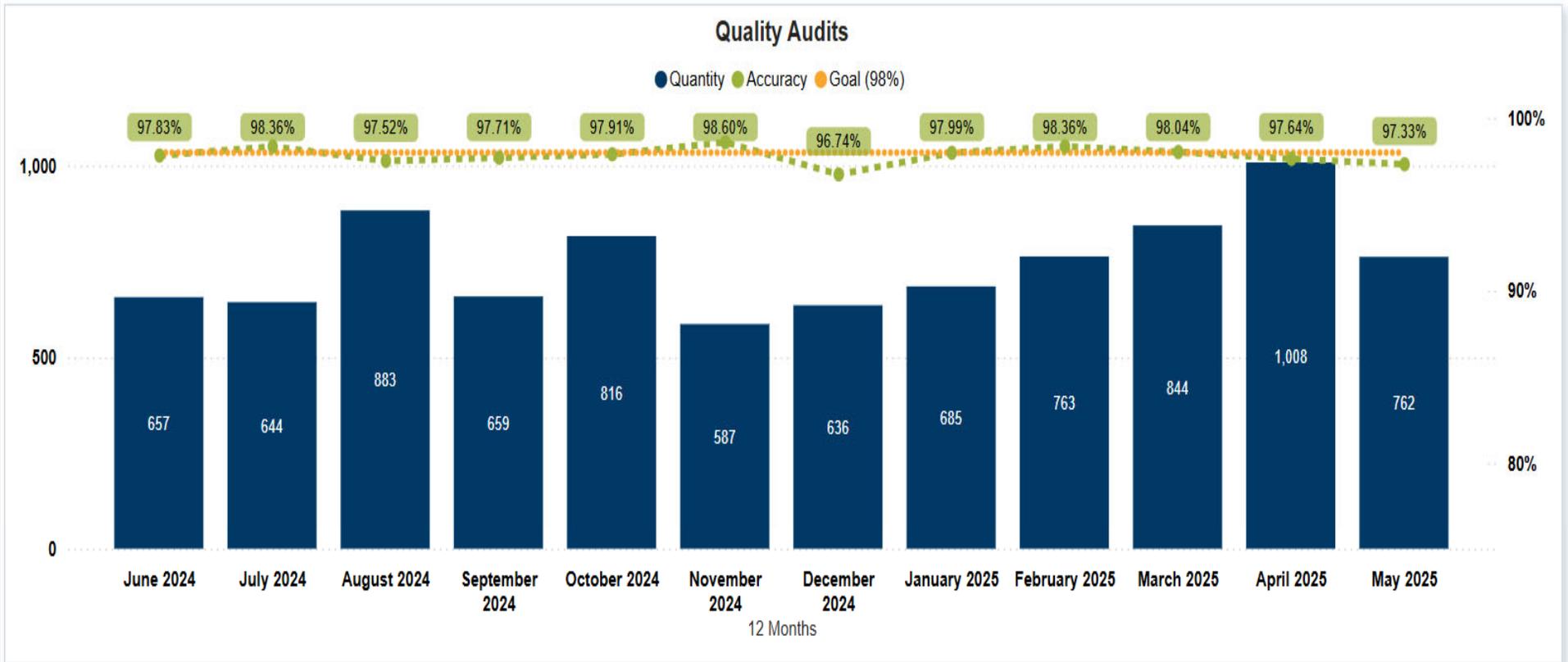
DEPARTMENT	No. of Applications	% of Inventory
SHERIFF	472	45.12%
L A COUNTY FIRE DEPT	185	17.69%
PROBATION DEPARTMENT	183	17.50%
CHILDREN & FAMILY SERVICES	23	2.20%
DEPT OF PUBLIC SOCIAL SERVICES	20	1.91%
NORTHEAST CLUSTER (LAC+USC)	17	1.63%
PUBLIC HEALTH PROGRAM	16	1.53%
PUBLIC WORKS	15	1.43%
SUPERIOR COURT/COUNTY CLERK	15	1.43%
MENTAL HEALTH	13	1.24%
DISTRICT ATTORNEY	12	1.15%
CORRECTIONAL HEALTH	10	0.96%
COASTAL CLUSTER-HARBOR/UCLA MC	8	0.76%
INTERNAL SERVICES	7	0.67%
HEALTH SERVICES ADMINISTRATION	6	0.57%
PUBLIC DEFENDER	6	0.57%
RANCHO LOS AMIGOS HOSPITAL	5	0.48%
AMBULATORY CARE NETWORK	5	0.48%
MEDICAL EXAMINER	4	0.38%
PUBLIC LIBRARY	3	0.29%
CHIEF EXECUTIVE OFFICE	3	0.29%
PARKS AND RECREATION	3	0.29%
ASSESSOR	2	0.19%
AGING DEPARTMENT	2	0.19%
CHILD SUPPORT SERVICES	2	0.19%
COUNTY COUNSEL	2	0.19%
SFV CLUSTER-OLIVE VIEW/UCLA MC	2	0.19%
REG-RECORDER/COUNTY CLERK	1	0.10%
BOARD OF SUPERVISORS	1	0.10%
AUDITOR - CONTROLLER	1	0.10%
BEACHES & HARBORS	1	0.10%
ANIMAL CONTROL	1	0.10%
<b>Grand Total</b>	<b>1046</b>	<b>100.00%</b>



# Striving for Excellence in Quality

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

Quality Assurance



### Monthly Recap

	Samples	Accuracy
<b>May 2025</b>		
Data Entry	120	97.29%
Payment Contract	409	97.13%
Retirement Election	233	97.70%
<b>Total</b>	<b>762</b>	<b>97.33%</b>

Prior audit values may update due to updated data.

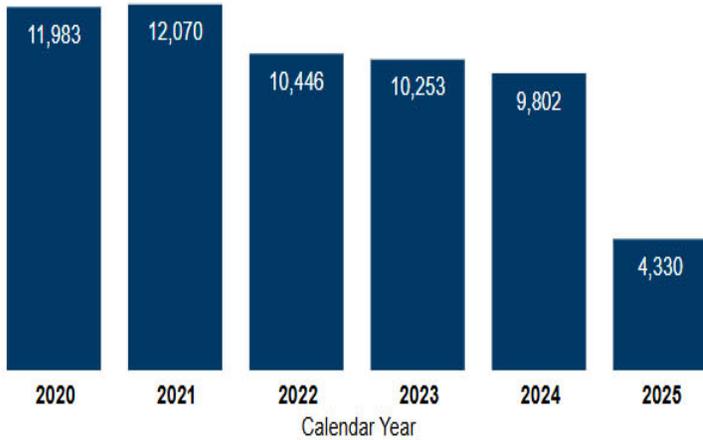


# Service Online For All

Service Metrics Reported on a Fiscal Year Basis (July 1) Through: May 2025

Serving Members Through LACERA.com and MyLACERA

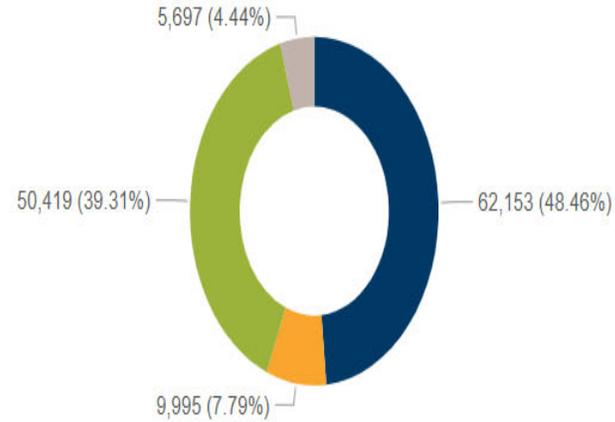
## Annual New MyLACERA Accounts\*



Data labels may not appear for all values

## Total Accounts by Member Type\*

Active Members Deferred & Inactive Members Retirees & Survivors Non-Members



Total Member Accounts  
**122,567**

% of Total Members  
**62%**

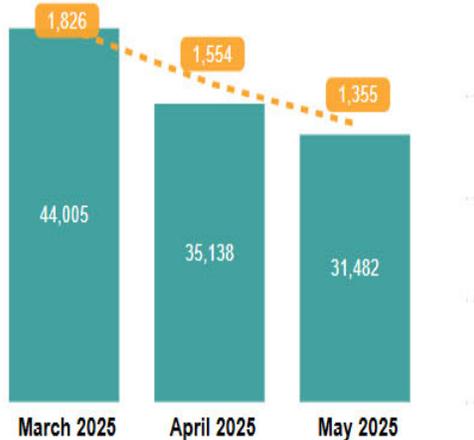
Excludes Non-Members

\*Data as of June 15, 2025

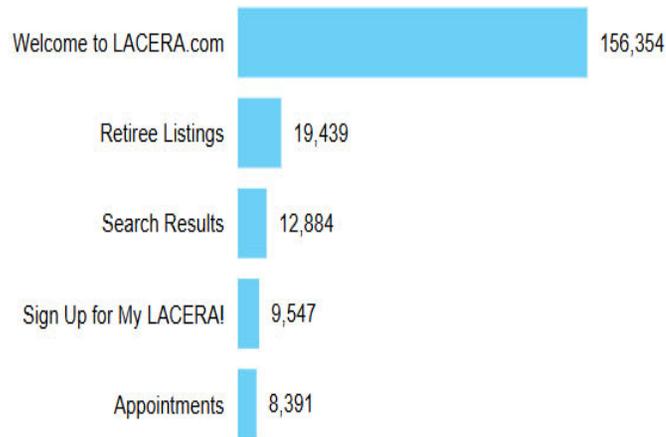
Non-Members include legal split payees and withdrawn members.

## LACERA.com User Traffic

First Time Visitors Average Per Day



## Top Five LACERA.com Page Views



## Busiest Day

05/01/2025

Home Page Tile	Views	% of Change
Board Meetings and Agendas	4,438	31.73%
Resource Center	3,805	0.53%
Ready to Retire	5,121	-6.69%
Investments	2,903	-11.30%
Careers	3,486	-11.41%
Sign Up for My LACERA!	9,547	-18.11%



# Member Snapshot

Metrics reported based on June 15, 2025

## Membership Count

	Active		Inactive		Retired				Total
	Active Vested	Active Non-Vested	Inactive Vested	Inactive Non-Vested	Service Retirement	SCD-Disability Retirement	NSCD-Disability Retirement	Survivors	
☐ General Plans	65,336	22,310	7,878	12,464	49,771	3,126	587	8,401	169,873
AG	34		9	30	10,522	798	130	4,087	15,610
BG	8		5	3	542	33	5	77	673
CG	8		5	7	340	36	6	68	470
DG	30,179	114	3,713	3,633	21,533	2,189	432	2,290	64,083
EG	11,173	4	2,228	331	16,384			1,839	31,959
GG	23,934	22,192	1,918	8,460	450	70	14	41	57,079
☐ Safety Plans	10,108	2,112	544	1,000	5,221	7,502	77	2,210	28,774
AS			1	2	1,664	2,189	23	1,711	5,590
BS	6,464	44	388	347	3,539	5,272	53	494	16,601
CS	3,644	2,068	155	651	18	41	1	5	6,583
<b>Total</b>	<b>75,444</b>	<b>24,422</b>	<b>8,422</b>	<b>13,464</b>	<b>54,992</b>	<b>10,628</b>	<b>664</b>	<b>10,611</b>	<b>198,647</b>

Membership Count vesting status excludes reciprocal service credit.

## Fire and Sheriff Retirements

● General Plans ● Safety Plans ● Total

### L A COUNTY FIRE DEPT

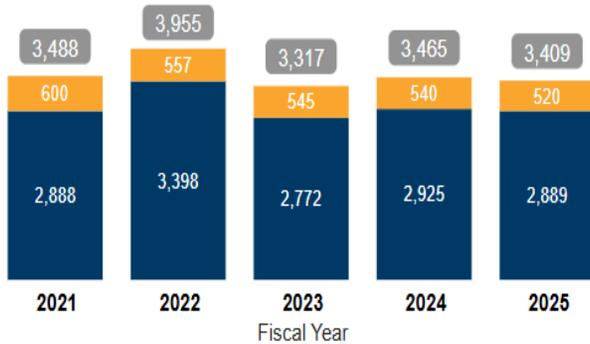


### SHERIFF



## Total Retirements by Type

● General Plans ● Safety Plans



## Monthly Benefit Allowance Distribution

Members and Survivors

Gross Benefit Range	General Plans	Safety Plans	Total
\$0 to \$3,999	35,933	1,434	37,367
\$4,000 to \$7,999	17,595	4,470	22,065
\$8,000 to \$11,999	5,442	4,661	10,103
\$12,000 to \$15,999	1,599	3,150	4,749
\$16,000 to \$19,999	562	837	1,399
\$20,000 to \$23,999	173	225	398
\$24,000 to \$27,999	61	94	155
> \$28,000	39	21	60
<b>Total</b>	<b>61,404</b>	<b>14,892</b>	<b>76,296</b>

## Member Average Monthly Benefit

▲ Plan Type Gross Average Benefit

General Plans	\$4,487.56
Safety Plans	\$9,906.68
<b>All Plans</b>	<b>\$5,534.35</b>

## Survivor Average Monthly Benefit

\$3,822.67

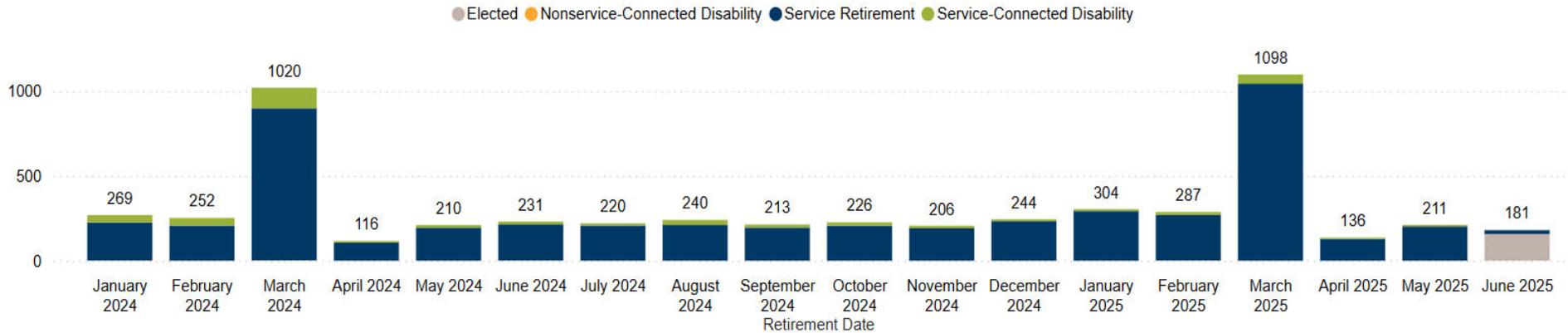
Data labels may not appear for all values

Only includes retirements as of reporting date. Excludes active deaths. Excludes Replacement Benefit Plan benefits.



# Member Snapshot

## Retirements



Elected retirements are members placed on the BOR Agenda, but not yet retired as of reporting date

Retirements Metrics reported based on June 15, 2025

### Monthly Retirements

Retirement Type	June 2025
Elected	157
Service Retirement	23
Service-Connected Disability	1
<b>Total</b>	<b>181</b>

### Retired Members Payroll

(As of 5/31/2025)

Monthly Payroll	\$413.68m
Payroll YTD	\$4.4b
New Retired Payees Added	253
Seamless %	94.07%
New Seamless Payees Added	4,494
Seamless YTD	97.51%
By Check %	2.00%
By Direct Deposit %	98.00%

### Healthcare Program

(Mo. Ending: 5/31/2025)

	Employer	Member
Medical	\$645.0	\$44.6
Dental	\$47.8	\$4.3
Part B	\$94.9	\$0.0
<b>Total</b>	<b>\$787.7</b>	<b>\$48.9</b>

### Health Care Enrollments

(Mo. Ending: 5/31/2025)

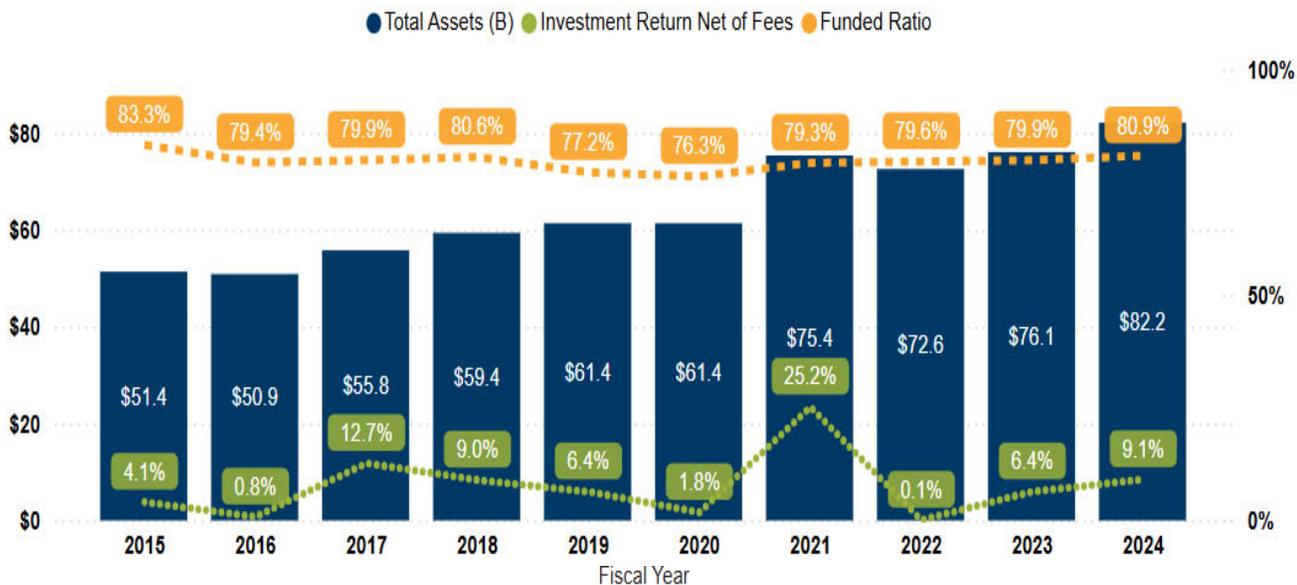
Medical	57,064
Dental	59,276
Part B	39,623
LTC	429
<b>Total</b>	<b>156,392</b>



# Key Financial Data

(As of June 30, 2024)

## Fiscal Year End Financial Update



### Funding Metrics

10.88% Employer NC  
 14.73% UAAL  
 7.00% Assumed Rate  
 \$608.6M Star Reserve  
 \$79.2B Total Net Assets

### Contributions

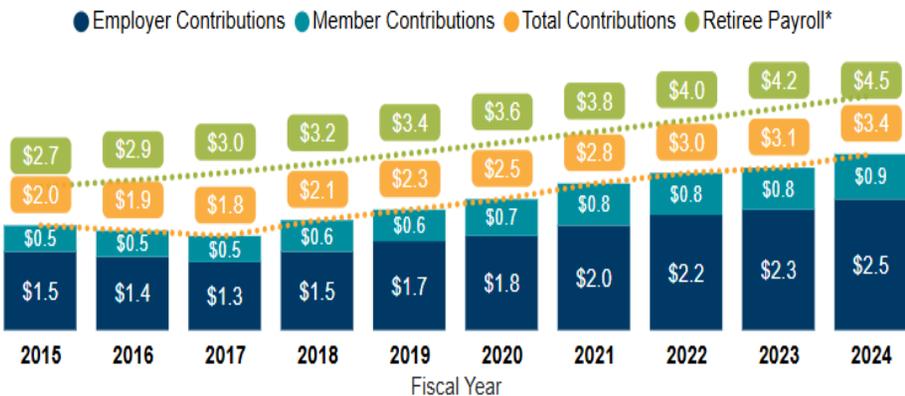
\$2.5B Employer Annual Contribution  
 25.61% Employer % of Payroll  
 \$861.0M Member Annual Contribution  
 8.46% Member % of Payroll

### Investment Returns

9.1% 1-Year Return *net of fees*  
 5.2% 3-Year Return  
 7.4% 10-Year Return

## Contributions and Retiree Payroll by Year

Dollars in Billions



\*Retiree Payroll includes pension benefits and excludes retiree healthcare benefits.

## LACERA Pension Dollar



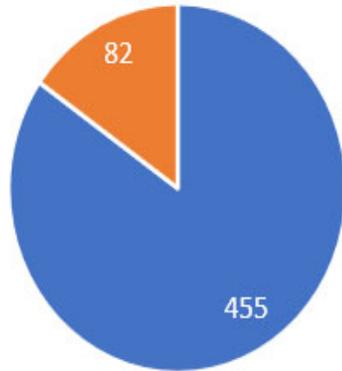


# Human Resources

Metrics reported based on June 15, 2025

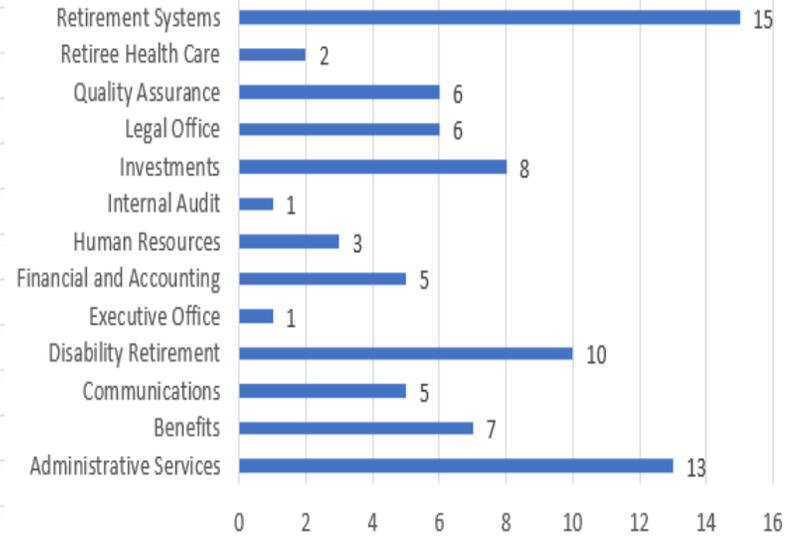
## Vacancy Rate 15%

\*Doe not reflect the 3 positions pending BOS approval.



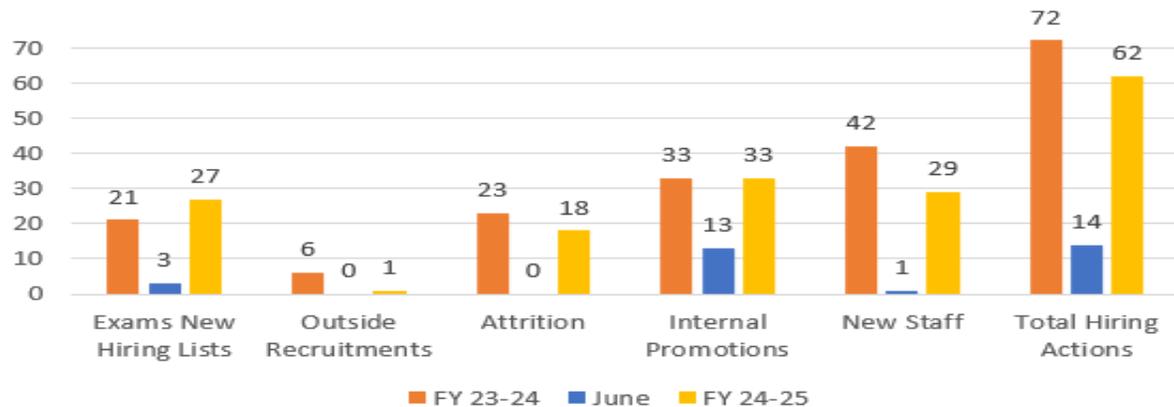
■ Filled Positions ■ Vacancies

## Vacancies by Division



Recruiting for Our Future

## HR Key Performance Indicators through 6/15/2025







## QUIET PERIOD LIST FOR TRUSTEES AND STAFF

Last Update 06/25/2025

### ADMINISTRATIVE/OPERATIONS

Solicitation Name	Issuing Division	Public Release Date	Solicitation Stage*	Bid Respondents*
RFQ: eDiscovery	Legal / InfoSec	12/1/2023	Contract Development	<ul style="list-style-type: none"><li>• GlobalRelay</li></ul>
RFP: Auditing and Consulting Services Pool	Internal Audit	2/13/2025	Vendor Selection	<ul style="list-style-type: none"><li>• Crowe</li><li>• HORNE</li><li>• Grant Thornton</li><li>• Canaudit</li><li>• Tap International Inc.</li><li>• Armanino</li><li>• Simpson &amp; Simpson</li><li>• Eide Bailly</li><li>• MGO</li><li>• GoldSRD</li></ul>
RFP: Financial Auditor Search	Internal Audit	4/30/2025	Soliciting Process	<ul style="list-style-type: none"><li>• BDO</li><li>• CLA</li><li>• Grant Thornton</li><li>• Eide Bailly</li><li>• Plante Moran</li><li>• Moss Adams/ Baker Tilly</li></ul>

\*Subject to change

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## INVESTMENTS

Solicitation Name	Issuing Division	Public Release Date	Solicitation Stage*	Bid Respondents *
Real Assets Emerging Manager Program Discretionary Separate Account Manager	Investments	3/29/2023	Contract Development Bid Review	<ul style="list-style-type: none"><li>• ORG Portfolio Management</li><li>• Barings</li><li>• Belay Investment Group</li><li>• Hamilton Lane</li><li>• Cambridge Associates</li><li>• Seed Partners</li><li>• Stable Asset Management</li><li>• Wafra Inc.</li><li>• Artemis Real Estate Partners</li><li>• Aether Investment Partners</li><li>• Neuberger Berman Group</li><li>• The Townsend Group</li><li>• BGO Strategic Capital Partners</li><li>• BlackRock</li><li>• StepStone</li><li>• GCM Grosvenor</li></ul>

\*Subject to change

Date	Conference
<b>July, 2025</b> 17-18	ICGN 30 <sup>th</sup> Anniversary Conference-Americas New York, NY
23-25	Pacific Pension Institute (PPI) Summer Roundtable Salt Lake City, UT
<b>August, 2025</b> 17-19	NCPERS (National Conference on Public Employee Retirement Systems) Public Pension Funding Forum Chicago, IL
<b>September, 2025</b> 8-10	Council of Institutional Investors (CII) Fall Conference San Francisco, CA
24-26	NCPERS (National Conference on Public Employee Retirement Systems) Public Pension HR Summit Philadelphia, PA
28-October 1	CRCEA (California Retired County Employees Association) Fall Conference Pleasanton, CA
<b>October, 2025</b> 3	CALAPRS (California Association of Public Retirement Systems) Round Table – Trustees Virtual
12-15	National Association of Corporate Directors (NACD) Directors Summit 2025 Washington D.C.
20-24	Investment Strategies & Portfolio Management Wharton School, University of Pennsylvania
22-24	PREA (Pension Real Estate Association) Annual Institutional Investor Conference Washington D.C.
19-21	Pacific Pension Institute (PPI) Executive Seminar Brisbane, Australia
22-24	Pacific Pension Institute (PPI) Asia Pacific Roundtable Sydney, Australia
25-26	NCPERS (National Conference on Public Employee Retirement Systems) Program for Advanced Trustee Studies (PATs) Ft. Lauderdale, FL
25-26	NCPERS (National Conference on Public Employee Retirement Systems) Accredited Fiduciary (NAF) Program Ft. Lauderdale, FL

Date	Conference
<b>October, 2025</b> 26-29	NCPERS (National Conference on Public Employee Retirement Systems) FALL (Financial, Actuarial, Legislative & Legal) Conference Ft. Lauderdale, FL
<b>November, 2025</b> 4-6	Institutional Limited Partners Association (ILPA) General Partner Summit New York, NY
9-12	IFEBP (International Foundation of Employment Benefit Plans) Annual Employee Benefits Conference Honolulu, HI
11-14	SACRS Fall Conference Huntington Beach, CA
<b>December, 2025</b> 7-11	Pacific Pension Institute (PPI) West Asia Study Mission to Abu Dhabi and Riyadh Abu Dhabi, United Arab Emirates (December 7-9) Riyadh, Kingdom of Saudi Arabia (December 10-11)
11	CALAPRS (California Association of Public Retirement Systems) Round Table – Benefits Virtual



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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**



July 1, 2025

**TO:** Trustees, Board of Retirement

**FOR:** Board of Retirement Meeting on July 10, 2025

**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 JULY 10, 2025

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ERIC A. BARRON	SHERIFF Dept.#SH	07-31-2025	36 YRS 02½ MOS
WILLIAM M. BOYCE	LA COUNTY FIRE DEPT Dept.#FR	07-16-2025	25 YRS 08 MOS
DAVID W. CARR	LA COUNTY FIRE DEPT Dept.#FR	08-30-2025	25 YRS ½ MOS
TODD M. CLOUTIER	LA COUNTY FIRE DEPT Dept.#FR	06-30-2025	20 YRS 00 MOS
DANA B. COOK	DISTRICT ATTORNEY Dept.#DA	09-02-2025	20 YRS 02½ MOS
RACHEL E. CUELLAR	SHERIFF Dept.#SH	08-15-2025	25 YRS ½ MOS
RICHARD L. DILIBERTI	SHERIFF Dept.#SH	08-11-2025	34 YRS 01½ MOS
GARY A. ESCOBEDO	LA COUNTY FIRE DEPT Dept.#FR	07-01-2025	26 YRS 11½ MOS
GREGORY L. EVANS	SHERIFF Dept.#SH	07-31-2025	30 YRS 04 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PABLO G. FERNANDEZ II	SHERIFF Dept.#SH	08-30-2025	29 YRS 05 MOS
ARLENE GARCIA	SHERIFF Dept.#SH	07-31-2025	29 YRS 00 MOS
KLAUS H. GIRMES	SHERIFF Dept.#SH	08-31-2025	33 YRS 11½ MOS
TASHEEN E. GLYNN	SHERIFF Dept.#SH	07-30-2025	28 YRS 07 MOS
COURTENAY GRIFFITH	LA COUNTY FIRE DEPT Dept.#FR	07-30-2025	25 YRS 02 MOS
ROSALINA L. HARRIS	SHERIFF Dept.#SH	06-18-2025	27 YRS 04 MOS
JOHN L. HEALD	SHERIFF Dept.#SH	07-31-2025	35 YRS 01½ MOS
CLINT E. HUGHES	SHERIFF Dept.#SH	08-30-2025	33 YRS 06 MOS
JOSEPH D. INGRAM	LA COUNTY FIRE DEPT Dept.#FR	08-05-2025	25 YRS ½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SANDRA L. JACKSON	SHERIFF Dept.#SH	08-15-2025	17 YRS 06½ MOS
JASON E. JONES	SHERIFF Dept.#SH	07-26-2025	24 YRS 10 MOS
BRIAN J. MANN	SHERIFF Dept.#SH	07-31-2025	35 YRS 06½ MOS
MILTON E. MARROQUIN	L A COUNTY FIRE DEPT Dept.#FR	07-31-2025	26 YRS 00 MOS
ROBERT A. NELSON	SHERIFF Dept.#SH	08-30-2025	31 YRS 00 MOS
ALBERT PLAZOLA	SHERIFF Dept.#SH	07-31-2025	27 YRS 08½ MOS
LUIS A. POLINO	L A COUNTY FIRE DEPT Dept.#FR	07-31-2025	31 YRS 00 MOS
JOHNNY G. QUICK	SHERIFF Dept.#SH	08-30-2025	30 YRS 04 MOS
HECTOR W. RAMIREZ	SHERIFF Dept.#SH	08-30-2025	34 YRS 03 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
REESE E. RANDOLPH JR	SHERIFF Dept.#SH	06-23-2025	27 YRS 07 MOS
YVETTE E. REYES	SHERIFF Dept.#SH	08-28-2025	28 YRS 06 MOS
MICHAEL J. RICHEY	LA COUNTY FIRE DEPT Dept.#FR	08-30-2025	33 YRS 01 MOS
MARTHA A. RIVERA-MACIA	SHERIFF Dept.#SH	08-15-2025	20 YRS 01½ MOS
DAVID R. TIMBERLAKE	SHERIFF Dept.#SH	07-31-2025	30 YRS ½ MOS
ARTHUR C. VELASQUEZ	SHERIFF Dept.#SH	09-05-2025	34 YRS 06½ MOS
RICHARD WELLS	LA COUNTY FIRE DEPT Dept.#FR	08-30-2025	28 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RAYMUND F. ADOC	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-23-2025	25 YRS 05 MOS
SIMON AGUILAR	ASSESSOR Dept.#AS	06-11-2025	34 YRS 11½ MOS
SOCORRO AGUILAR	PROBATION DEPARTMENT Dept.#PB	08-27-2025	40 YRS 07 MOS
JERRY L. ALCAREZ	AMBULATORY CARE NETWORK Dept.#HN	07-31-2025	20 YRS 00 MOS
JAIME ALEJO	CORRECTIONAL HEALTH Dept.#HC	05-31-2025	28 YRS 03½ MOS
CARLOS A. ALVARENGA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	05-31-2025	21 YRS 06½ MOS
GREGORY R. APT	DISTRICT ATTORNEY Dept.#DA	06-30-2025	35 YRS 05 MOS
LYDIA E. ARELLANO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-30-2025	33 YRS 10½ MOS
EVELYN S. ARREDONDO	SHERIFF Dept.#SH	07-05-2025	25 YRS 11½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
LEON H. ARTERBERRY	INTERNAL SERVICES Dept.#IS	06-24-2025	16 YRS 08 MOS
PETER ASHFORD-MORE	CORRECTIONAL HEALTH Dept.#HC	06-15-2025	13 YRS 04½ MOS
MYRON ASHLEY	PROBATION DEPARTMENT Dept.#PB	05-31-2025	25 YRS 02½ MOS
RAUL AVILA	SHERIFF Dept.#SH	08-29-2025	26 YRS 03 MOS
LORENA AYALA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	35 YRS 00 MOS
BARBARA A. BAGLEY	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-30-2025	26 YRS 05 MOS
YOLANDA B. BAGWELL	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-29-2025	34 YRS 06 MOS
RICARDO A. BAIRES JR	INTERNAL SERVICES Dept.#IS	08-30-2025	25 YRS 03 MOS
FATIMA C. BALDIZON	MENTAL HEALTH Dept.#MH	06-28-2025	21 YRS 10 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SUZETTE S. BARBA	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	08-30-2025	25 YRS 00 MOS
KASHIM M. BAXTER	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-27-2025	37 YRS 10 MOS
TONI M. BEAMON	PROBATION DEPARTMENT Dept.#PB	06-30-2025	25 YRS 03 MOS
CHRISTOPHER J. BEBOUT	PUBLIC WORKS Dept.#PW	09-20-2025	25 YRS 03 MOS
MARTIN BERG	BOARD OF SUPERVISORS Dept.#BS	03-29-2025	06 YRS 02½ MOS
ERNIE R. BETANCOURT	PUBLIC WORKS Dept.#PW	08-01-2025	38 YRS 05½ MOS
CHERYL BILLIPS TAYL	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-30-2025	31 YRS 07 MOS
RANDY BLAKE	MENTAL HEALTH Dept.#MH	06-18-2025	09 YRS 05½ MOS
HELEN ANGELA BORELAND-NEU	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-30-2025	26 YRS 02 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
YVETTE M. BOSTON-DARTO	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	20 YRS 05½ MOS
LATASHA D. BRADFORD	PROBATION DEPARTMENT Dept.#PB	07-31-2025	25 YRS 01½ MOS
ROBERT J. BRADY	PUBLIC HEALTH PROGRAM Dept.#PH	07-07-2025	34 YRS 07½ MOS
CATHY T. BU	PUBLIC WORKS Dept.#PW	07-31-2025	33 YRS 11½ MOS
ADELINA R. BUJANDA	ASSESSOR Dept.#AS	06-28-2025	39 YRS 07 MOS
YVETTE R. BURLEY	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-15-2025	25 YRS 05 MOS
DONNA L. BURNS	DISTRICT ATTORNEY Dept.#DA	07-27-2025	42 YRS 11 MOS
DANIEL CARRERA	SHERIFF Dept.#SH	06-30-2025	25 YRS ½ MOS
IRMA L. CASTEEL	CHILDREN & FAMILY SERVICES Dept.#CH	07-31-2025	23 YRS 07½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANGELINA E. CEDILLO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-29-2025	38 YRS 07 MOS
ANITA S. CHAN	AMBULATORY CARE NETWORK Dept.#HN	07-31-2025	16 YRS 10½ MOS
KAREN C. CHAU	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-30-2025	25 YRS 02 MOS
LYDIA CHAVEZ	SHERIFF Dept.#SH	06-28-2025	33 YRS 06 MOS
HANNAH CHEN COLOM	CHIEF EXECUTIVE OFFICE Dept.#AO	06-30-2025	39 YRS 02½ MOS
SHU K. CHEUNG	CHILDREN & FAMILY SERVICES Dept.#CH	06-28-2025	25 YRS 00 MOS
CHONAA. CHUA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	08-30-2025	36 YRS 09 MOS
LEIGH CLAUSEN	ANIMAL CONTROL Dept.#AN	05-30-2025	09 YRS 09 MOS
BARBARA C. COBLE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	26 YRS ½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANTHONY Q. COLEMAN	PROBATION DEPARTMENT Dept.#PB	08-29-2025	31 YRS 05 MOS
ARLENE COLEMAN-BROW	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-31-2025	42 YRS 10½ MOS
DAVID COLUMBUS	LACERA Dept.#NL	08-16-2025	18 YRS 01 MOS
MELEN-PIO T. CORDOVA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	26 YRS 06½ MOS
MARTIN A. CORONA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	08-30-2025	25 YRS 04 MOS
MARK A. CORTI	PUBLIC DEFENDER Dept.#PD	07-25-2025	20 YRS 03 MOS
SHERRY D. CUMMINGS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-28-2025	26 YRS 06 MOS
MICHELLE DANG	SHERIFF Dept.#SH	07-27-2025	18 YRS 02 MOS
DEBRINA D. DANTE	CHILDREN & FAMILY SERVICES Dept.#CH	07-31-2025	38 YRS 09 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARTHA A. DAVILA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	08-30-2025	20 YRS 09 MOS
ROBERTA DE LA CRUZ	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	06-28-2025	36 YRS 06 MOS
OSCAR D. DE LA LLERA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-30-2025	22 YRS 01 MOS
THOMAS E. DE SANTIS	INTERNAL SERVICES Dept.#IS	05-23-2025	07 YRS 03 MOS
MARIA B. DEVERA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	06-20-2025	41 YRS 11 MOS
VIRGINIA DIAZ	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	07-31-2025	36 YRS 06½ MOS
BEATRICE E. DIKE	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-29-2025	03 YRS 07½ MOS
LEN T. DO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	26 YRS 07½ MOS
PAULA L. DOBRZANSKI	SHERIFF Dept.#SH	07-30-2025	20 YRS 00 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DEBRA A. DONSON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-25-2025	27 YRS 00 MOS
TAMASHA X. EARL	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	07-28-2025	25 YRS 08 MOS
VANESSA EBENEZER	PARKS AND RECREATION Dept.#PK	08-29-2025	19 YRS 00 MOS
DENISE M. EBERLE	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	08-30-2025	40 YRS 04 MOS
LAUREN J. ENGEL	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-29-2025	35 YRS 10 MOS
AGRETTA D. EPPS	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	05-31-2025	23 YRS 05½ MOS
LILIAN R. ESPEJO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-31-2025	28 YRS 08 MOS
CHRISTOPHER A. FEDOROFF	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-09-2025	27 YRS 05½ MOS
ROBERT A. FETTERLY	CHILDREN & FAMILY SERVICES Dept.#CH	05-04-2025	10 YRS 04½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ELISE D. FIERMAN	MENTAL HEALTH Dept.#MH	07-30-2025	35 YRS 03 MOS
JUAN FLORES	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-31-2025	13 YRS 01 MOS
KIMBERLY A. FOSTER	MENTAL HEALTH Dept.#MH	07-31-2025	35 YRS 02½ MOS
BRENDA J. FOSTER	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	20 YRS 00 MOS
JOSUE FRAGOSO	PUBLIC WORKS Dept.#PW	08-30-2025	44 YRS 03 MOS
OLIVIA T. FRANCIS	SHERIFF Dept.#SH	07-31-2025	33 YRS 05½ MOS
RENE FRANCIS	PROBATION DEPARTMENT Dept.#PB	05-09-2025	34 YRS 04½ MOS
NELSON FRANK	CHILDREN & FAMILY SERVICES Dept.#CH	06-28-2025	28 YRS 02 MOS
TERESA GARCIA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-31-2025	21 YRS 02½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ALICE GHARAPETYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	04-01-2025	34 YRS 10½ MOS
GERALD E. GRIFFIN	AUDITOR - CONTROLLER Dept.#AU	06-28-2025	46 YRS 09 MOS
ROSA I. GUERRERO	PROBATION DEPARTMENT Dept.#PB	07-31-2025	33 YRS 11½ MOS
MELBA J. HALE	AGING DEPARTMENT Dept.#AG	08-30-2025	25 YRS 04 MOS
GEORGE S. HANNA	ASSESSOR Dept.#AS	06-28-2025	26 YRS 01 MOS
JIMMY R. HARRIS	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-23-2025	35 YRS 04 MOS
LAVEL C. HAWKINS	CHILDREN & FAMILY SERVICES Dept.#CH	06-02-2025	30 YRS 08 MOS
SONJA C. HAYWOOD	SHERIFF Dept.#SH	08-01-2025	36 YRS 07½ MOS
MICHAEL M. HEDGECOCK	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	08-28-2025	30 YRS 05 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHELLE R. HERNANDEZ	PUBLIC LIBRARY Dept.#PL	08-30-2025	25 YRS 04 MOS
CECELIA HERNANDEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-30-2025	34 YRS 07 MOS
CARLOS J. HERRERA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-28-2025	29 YRS 06½ MOS
PAMELA D. HINES	PUBLIC HEALTH PROGRAM Dept.#PH	07-25-2025	17 YRS 02 MOS
SHU PI HO	MENTAL HEALTH Dept.#MH	07-31-2025	24 YRS 07½ MOS
KRISTINE I. HOBBS	MENTAL HEALTH Dept.#MH	07-25-2025	26 YRS 07½ MOS
EDWARD A. HOLLIS JR	SHERIFF Dept.#SH	07-31-2025	17 YRS 04½ MOS
RAMONA HOLLMANN	CHILDREN & FAMILY SERVICES Dept.#CH	07-17-2025	27 YRS 04 MOS
KELLY M. HONG	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	38 YRS 06½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DODDRIDGE D. HOSSUM	CHILDREN & FAMILY SERVICES Dept.#CH	06-28-2025	27 YRS 08 MOS
TERESITA C. IBARRA	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-31-2025	26 YRS ½ MOS
EDITH R. JARANILLA	PUBLIC HEALTH PROGRAM Dept.#PH	06-28-2025	25 YRS 00 MOS
TONYA M. JOHNSON	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-07-2025	25 YRS 09½ MOS
AUDREY JOHNSON	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	08-30-2025	34 YRS 01 MOS
ROBERT A. JOHNSON	CORRECTIONAL HEALTH Dept.#HC	08-29-2025	28 YRS 07 MOS
ROBIN D. JONES	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-30-2025	35 YRS 08 MOS
LORETTA JONES	PROBATION DEPARTMENT Dept.#PB	07-31-2025	44 YRS 08 MOS
LARNEICE M. JORDAN	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-27-2025	21 YRS 01½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JOSE L. JUAREZ	PROBATION DEPARTMENT Dept.#PB	06-30-2025	36 YRS 10 MOS
ADA M. JUAREZ	CORRECTIONAL HEALTH Dept.#HC	07-31-2025	26 YRS 07½ MOS
ASHOK K. KARNANI	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	07-16-2025	19 YRS 07 MOS
ROBERT M. KAWAHARA	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-30-2025	23 YRS 05 MOS
JUNG AI KIM	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-30-2025	16 YRS 02 MOS
DONELL KINSEY	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	07-31-2025	37 YRS 07½ MOS
THERESA M. KOLINSKI	SHERIFF Dept.#SH	07-31-2025	34 YRS ½ MOS
JANAKI C. KOTELAWALA	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	04-28-2025	06 YRS 11½ MOS
AIDA L. KROSS	MENTAL HEALTH Dept.#MH	05-31-2025	42 YRS 02½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
FERDINAND KUMALA	DEPARTMENT OF HUMAN RESOURCES Dept.#HM	06-27-2025	25 YRS 01 MOS
SONIA S. KWOK	PUBLIC HEALTH PROGRAM Dept.#PH	08-30-2025	20 YRS 07 MOS
MARIA C. LANDERO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-26-2025	25 YRS 05 MOS
MICHAEL E. LANGHANS	REG-RECORDER/COUNTY CLERK Dept.#RR	07-04-2025	15 YRS 09½ MOS
LEO G. LAOANG	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-31-2025	16 YRS 10½ MOS
BLANCA L. LAPOINTE	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	33 YRS 10½ MOS
NAM LE	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-24-2025	31 YRS 03 MOS
GWEN LEE D. LEDESMA-TABA	AMBULATORY CARE NETWORK Dept.#HN	07-31-2025	18 YRS ½ MOS
SUTTIRA LEELAVANICH	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	07-26-2025	33 YRS 00 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
LUWANA J. LEHMAN	AMBULATORY CARE NETWORK Dept.#HN	07-31-2025	20 YRS 01 MOS
CYNTHIA L. LESHAY	LACERA Dept.#NL	07-31-2025	19 YRS ½ MOS
EDWINA F. LEWIS	CHILDREN & FAMILY SERVICES Dept.#CH	08-29-2025	40 YRS 00 MOS
MINDA S. LIGHT	CHILDREN & FAMILY SERVICES Dept.#CH	08-29-2025	38 YRS 10 MOS
KAREN S. LING	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-31-2025	23 YRS 09½ MOS
ERIC V. LOPEZ	SHERIFF Dept.#SH	08-31-2025	24 YRS 05 MOS
PAULA R. LOPEZ	COMMUNITY HEALTH PROGRAMS Dept.#HU	08-01-2025	25 YRS ½ MOS
ARMIDA A. LOPEZ	CHILD SUPPORT SERVICES Dept.#CD	08-16-2025	34 YRS 00 MOS
JOHN M. LOVRENSKY	PUBLIC WORKS Dept.#PW	07-31-2025	40 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JAMES S. LOWELL	COUNTY COUNSEL Dept.#CC	07-31-2025	24 YRS 01½ MOS
GLADIS A. LUCHO	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	05-30-2025	36 YRS 00 MOS
JOHNNY P. LUNA	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	16 YRS 07 MOS
ALICIA M. LUNA-GARCIA	CHILDREN & FAMILY SERVICES Dept.#CH	06-28-2025	43 YRS 08 MOS
AZNIV LUSPARYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	25 YRS 08½ MOS
MICHAEL L. MAC PHERSON	PROBATION DEPARTMENT Dept.#PB	07-12-2025	35 YRS ½ MOS
RACHEL MACHADO	HEALTH SERVICES ADMINISTRATION Dept.#HS	04-30-2025	20 YRS 00 MOS
JOSE L. MACHICADO	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-31-2025	25 YRS 06½ MOS
EDNA A. MARTINEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-30-2025	25 YRS 02½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
LUVIA A. MARTINEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	35 YRS 04½ MOS
EMMA J. MASON FARRIS	REG-RECORDER/COUNTY CLERK Dept.#RR	08-30-2025	10 YRS 00 MOS
SCOTT W. MCDERMOTT	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	08-01-2025	35 YRS ½ MOS
JESSIE L. MCGRATH	DISTRICT ATTORNEY Dept.#DA	06-28-2025	41 YRS 10½ MOS
KIRK G. MEARS	PROBATION DEPARTMENT Dept.#PB	08-01-2025	27 YRS 04½ MOS
NERSES MEGERTOUMIAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-25-2025	25 YRS 00 MOS
MELANIE R. MILLER	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-18-2025	39 YRS 01 MOS
SALLIE MILNE	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-30-2025	25 YRS 00 MOS
ALEJANDRO MIRANDA	PARKS AND RECREATION Dept.#PK	07-27-2025	20 YRS 00 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANTHONY MONTANEZ	PARKS AND RECREATION Dept.#PK	08-30-2025	37 YRS 08 MOS
CHRISTINA MONTIEL	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	30 YRS 06 MOS
ANGELICA T. MOORE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-30-2025	15 YRS 09½ MOS
DENISE L. MORALES	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	05-31-2025	18 YRS 06½ MOS
CHARLOTTE M. MORRISON	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-26-2025	26 YRS 01 MOS
NOEMI MUNOZ	AMBULATORY CARE NETWORK Dept.#HN	08-30-2025	18 YRS 00 MOS
SHIKARI NAKAGAWA-OTA	PUBLIC HEALTH PROGRAM Dept.#PH	06-28-2025	30 YRS 06 MOS
JANET L. NEWTON	CHILDREN & FAMILY SERVICES Dept.#CH	06-28-2025	41 YRS 05 MOS
FRANK P. NUNEZ	SHERIFF Dept.#SH	08-30-2025	38 YRS 06 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHRISTOPHER R. NUNEZ	PROBATION DEPARTMENT Dept.#PB	08-30-2025	29 YRS 08½ MOS
FELIPE B. OAMAR	CORRECTIONAL HEALTH Dept.#HC	05-31-2025	20 YRS 08½ MOS
SYLVIA A. OGHOLEKIAN	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	13 YRS 05½ MOS
MYSHALE T. OLIVER	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	26 YRS 11 MOS
TIFFANY S. ORDONEZ	PROBATION DEPARTMENT Dept.#PB	07-31-2025	26 YRS 03 MOS
DEL A. ORTEGA	PUBLIC WORKS Dept.#PW	08-07-2025	39 YRS 05½ MOS
MARCO T. ORTIZ	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	09-16-2025	17 YRS 07½ MOS
VIRGINIA F. OWENS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	05-31-2025	09 YRS 03½ MOS
RONALD A. PALMER	PROBATION DEPARTMENT Dept.#PB	05-16-2025	21 YRS 10½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
FRANCES A. PALUMBO	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-31-2025	45 YRS 05½ MOS
ANA I. PAVLAKOVICH	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-30-2025	24 YRS 09 MOS
JERI M. PELLERIN	CHILD SUPPORT SERVICES Dept.#CD	06-28-2025	25 YRS 04 MOS
ROSA O. PEREZ	HEALTH SERVICES ADMINISTRATION Dept.#HS	08-30-2025	31 YRS 08 MOS
ROY P. PIERCE	INTERNAL SERVICES Dept.#IS	07-15-2025	25 YRS 01 MOS
APRIL PINAL	BOARD OF SUPERVISORS Dept.#BS	06-27-2025	26 YRS 04½ MOS
JANETTE PINETTA-ARZU	LA COUNTY FIRE DEPT Dept.#FR	06-30-2025	19 YRS 09½ MOS
TEODORO J. PINTO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	40 YRS 01 MOS
LORI A. PLACIDE	PROBATION DEPARTMENT Dept.#PB	07-19-2025	40 YRS 01 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHAEL D. PLANCK	MENTAL HEALTH Dept.#MH	07-31-2025	17 YRS 06½ MOS
TIFFINY L. POLK	CHILDREN & FAMILY SERVICES Dept.#CH	07-19-2025	32 YRS 06 MOS
CHARLES PORNBIDA	PUBLIC HEALTH PROGRAM Dept.#PH	07-31-2025	24 YRS 06½ MOS
SHANNON S. PRESBY	DISTRICT ATTORNEY Dept.#DA	06-27-2025	30 YRS 01 MOS
DOROTHY L. PRICE	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-28-2025	43 YRS 11 MOS
LEONARDO C. QUILANG	AMBULATORY CARE NETWORK Dept.#HN	08-30-2025	23 YRS 08 MOS
HILDA RAMIREZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-26-2025	27 YRS 02 MOS
BETTYE J. RIGGS-LINARE	SHERIFF Dept.#SH	08-31-2025	18 YRS ½ MOS
MARIA C. RIVERO	CHILD SUPPORT SERVICES Dept.#CD	06-30-2025	23 YRS 09 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RAYMOND C. RO	PROBATION DEPARTMENT Dept.#PB	05-31-2025	26 YRS 05 MOS
JERRY ROBY	PUBLIC WORKS Dept.#PW	05-27-2025	27 YRS 05½ MOS
JOSE A. RODRIGUEZ	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-24-2025	35 YRS 07 MOS
JORGE RODRIGUEZ	REG-RECORDER/COUNTY CLERK Dept.#RR	08-30-2025	25 YRS 01 MOS
MARCOS E. ROJAS	SHERIFF Dept.#SH	05-30-2025	30 YRS 03 MOS
HELEN M. ROL	HEALTH SERVICES ADMINISTRATION Dept.#HS	07-31-2025	25 YRS ½ MOS
ELOISA ROMERO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	30 YRS 09 MOS
MARIA PERLA H. ROSALES	MENTAL HEALTH Dept.#MH	07-31-2025	25 YRS ½ MOS
PHILIP ROSE	PUBLIC WORKS Dept.#PW	05-30-2025	44 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ALMA ROSILES	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-28-2025	20 YRS 06 MOS
DAVID A. ROSS	ALTERNATE PUBLIC DEFENDER Dept.#AD	08-30-2025	28 YRS 00 MOS
JAMES C. SABIO	ASSESSOR Dept.#AS	07-31-2025	35 YRS 04½ MOS
DANIEL SAHAGUN	PROBATION DEPARTMENT Dept.#PB	07-31-2025	30 YRS 06 MOS
GEORGINA SALAZAR	CHILDREN & FAMILY SERVICES Dept.#CH	07-31-2025	27 YRS ½ MOS
JERRY SAN MARTIN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-05-2025	13 YRS 03½ MOS
CHRISTINA J. SANCHEZ	RANCHO LOS AMIGOS HOSPITAL Dept.#HR	06-28-2025	35 YRS 07½ MOS
SANDRA D. SANCHEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-27-2025	37 YRS 04 MOS
SYLVIA SANCHEZ	REG-RECORDER/COUNTY CLERK Dept.#RR	06-28-2025	21 YRS 11½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
YOLETTA SANTOS	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	08-30-2025	21 YRS 11 MOS
KIMBERLY A. SCHUMANN	ANIMAL CONTROL Dept.#AN	07-13-2025	15 YRS 09½ MOS
MARIA E. SETIAWAN	PUBLIC WORKS Dept.#PW	05-30-2025	17 YRS 03 MOS
DANIEL SHELLEY	PUBLIC HEALTH PROGRAM Dept.#PH	08-30-2025	28 YRS 05 MOS
GRACE SICILIANO	DISTRICT ATTORNEY Dept.#DA	06-28-2025	11 YRS 03 MOS
ROBERT R. SIGALA	PUBLIC WORKS Dept.#PW	06-27-2025	24 YRS 06 MOS
THERESA A. SLACK	SHERIFF Dept.#SH	08-29-2025	45 YRS 01 MOS
CONNIE P. SMITH	SHERIFF Dept.#SH	08-30-2025	47 YRS 00 MOS
BRYAN T. SMITH	PUBLIC DEFENDER Dept.#PD	07-26-2025	30 YRS 00 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JANICE G. SMITH	SHERIFF Dept.#SH	06-28-2025	37 YRS 11 MOS
JOEL D. SOKOLOW	DEPARTMENT OF HUMAN RESOURCES Dept.#HM	08-30-2025	38 YRS 09 MOS
GUADALUPE SOTO	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-28-2025	35 YRS 09 MOS
SEAN STANLEY	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	08-01-2025	19 YRS ½ MOS
TED C. STEN	PUBLIC HEALTH PROGRAM Dept.#PH	07-01-2025	21 YRS 05½ MOS
CONNIE D. STEWART	HEALTH SERVICES ADMINISTRATION Dept.#HS	06-30-2025	40 YRS 09 MOS
THERESA J. STREISEL	PROBATION DEPARTMENT Dept.#PB	07-26-2025	24 YRS 00 MOS
KAREN A. SWANSON	PUBLIC HEALTH PROGRAM Dept.#PH	05-31-2025	27 YRS 09½ MOS
SHARON E. SYLVERS	PUBLIC HEALTH PROGRAM Dept.#PH	06-15-2025	18 YRS 06½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ROXY SZEFTTEL	MENTAL HEALTH Dept.#MH	06-27-2025	14 YRS 07½ MOS
SHERYL A. TALAVERA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.#HO	07-30-2025	23 YRS 01 MOS
SHERYL W. TAYLOR	ASSESSOR Dept.#AS	06-21-2025	39 YRS 02 MOS
LARRY TAYLOR	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	07-31-2025	38 YRS 08 MOS
MARYANNE T. THEIS	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-16-2025	34 YRS 03 MOS
EVA G. TRIPLETT	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-31-2025	23 YRS 08 MOS
GALA G. TURNER	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-12-2025	24 YRS 03½ MOS
RACHELLE TURNER-SAVAL	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-20-2025	33 YRS 07 MOS
ROSA N. UGAZ	HEALTH SERVICES ADMINISTRATION Dept.#HS	09-17-2025	33 YRS 10½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PATTI L. ULLERICH	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-29-2025	39 YRS 05 MOS
JOCELYN S. ULPINDO	CORRECTIONAL HEALTH Dept.#HC	06-30-2025	22 YRS 02 MOS
CARLOS J. VALLARTA	SHERIFF Dept.#SH	04-27-2025	23 YRS 00 MOS
HIEU C. VAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-31-2025	35 YRS 01½ MOS
ANGELA VELASCO	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	06-30-2025	31 YRS 06 MOS
DARIO VILLAMARIN	CHILDREN & FAMILY SERVICES Dept.#CH	06-27-2025	34 YRS 09 MOS
NORA R. VILLAPANDO	AMBULATORY CARE NETWORK Dept.#HN	06-30-2025	17 YRS 00 MOS
JAMES J. WANG	AMBULATORY CARE NETWORK Dept.#HN	08-29-2025	25 YRS 09 MOS
FAWNTELLE P. WHITE	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	07-15-2025	17 YRS 01½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ALMAS E. WHITNEY	REG-RECORDER/COUNTY CLERK Dept.#RR	08-30-2025	25 YRS ½ MOS
TIFFANY T. WILLIAMS	CHIEF EXECUTIVE OFFICE Dept.#AO	07-12-2025	39 YRS ½ MOS
DEEDRA D. WILLIAMS	HEALTH SERVICES ADMINISTRATION Dept.#HS	07-01-2025	10 YRS 06½ MOS
KAMYA WILSON	SUPERIOR COURT/COUNTY CLERK Dept.#SC	08-30-2025	17 YRS 05½ MOS
ROSELLINE L. WONG	TREASURER AND TAX COLLECTOR Dept.#TT	07-31-2025	30 YRS 05½ MOS
LISA WOODS	CHILDREN & FAMILY SERVICES Dept.#CH	07-31-2025	40 YRS ½ MOS
MICHELLE L. WYRICK	CHILD SUPPORT SERVICES Dept.#CD	07-31-2025	15 YRS 11½ MOS
DAVID C. WYSOCKI	PUBLIC LIBRARY Dept.#PL	08-28-2025	34 YRS 11 MOS
LORI Y. YEE	SHERIFF Dept.#SH	08-30-2025	31 YRS 05 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIREMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JARVIS YOUNG	INTERNAL SERVICES Dept.#IS	06-28-2025	50 YRS 05 MOS
JANET YU	CHILDREN & FAMILY SERVICES Dept.#CH	06-15-2025	23 YRS 07½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

### GENERAL SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RYAN T. WOODS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	02-06-2023	07 YRS 05½ MOS
SON of RAFIEKKI M BOYKIN dec'd on 02-05-2023, Sect. #31781.3			

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DOMINIC A. DANNAN	SHERIFF Dept.#SH	06-22-2025	14 YRS 06½ MOS
CLAY GRANT JR.	SHERIFF Dept.#SH	06-17-2025	13 YRS 08 MOS
TUAT-LONG LA	SHERIFF Dept.#SH	05-27-2025	06 YRS 00 MOS
ANTONIA M. RAMIREZ	SHERIFF Dept.#SH	06-02-2025	13 YRS 00 MOS
JAMES R. TRABBIE	SHERIFF Dept.#SH	07-02-2025	05 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
BERNICE E. AKANNO	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-23-2025	15 YRS 01 MOS
REYNOLD P. ALFONSO	PUBLIC WORKS Dept.#PW	07-21-2025	10 YRS 09 MOS
LANI R. ALFONSO	PUBLIC WORKS Dept.#PW	07-12-2025	28 YRS 07 MOS
LUZ C. ARIAS	MENTAL HEALTH Dept.#MH	05-22-2025	10 YRS 01½ MOS
ALEXA A. BENSON	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-01-2025	07 YRS 03 MOS
CHITRA A. BHAKTA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-13-2025	05 YRS 05½ MOS
STEVEN T. BRAIDA	PARKS AND RECREATION Dept.#PK	07-10-2025	15 YRS 04 MOS
LINDA M. BREECH	SUPERIOR COURT/COUNTY CLERK Dept.#SC	06-20-2025	17 YRS 03½ MOS
MARK L. CANEVARI	AUDITOR - CONTROLLER Dept.#AU	07-01-2025	11 YRS 02 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MIGUEL A. COLACION	SHERIFF Dept.#SH	01-17-2025	05 YRS 05 MOS
ROBERT P. COLVIN	PUBLIC WORKS Dept.#PW	05-16-2025	21 YRS 01½ MOS
RICARDO DIAZ	PUBLIC WORKS Dept.#PW	08-08-2025	11 YRS 11 MOS
TRACEY L. DUNNE	MENTAL HEALTH Dept.#MH	04-30-2025	06 YRS 00 MOS
PATRICIA FELKER	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	06-25-2025	11 YRS 02 MOS
JUANITA GAMBER	SHERIFF Dept.#SH	06-27-2025	29 YRS 07 MOS
STEPHEN C. GILLON	PUBLIC WORKS Dept.#PW	08-07-2025	29 YRS 07½ MOS
PENNY A. GLEASON	PUBLIC WORKS Dept.#PW	06-09-2025	10 YRS 10 MOS
IRMA GOMEZ	CHILD SUPPORT SERVICES Dept.#CD	05-12-2025	18 YRS 09 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RANDALL J. GRAHAM	HEALTH SERVICES ADMINISTRATION Dept.#HS	03-01-2025	14 YRS 06 MOS
NISHA HATIA	AMBULATORY CARE NETWORK Dept.#HN	07-31-2025	22 YRS 10 MOS
NATOYA Y. HENDERSON	CHIEF EXECUTIVE OFFICE Dept.#AO	06-28-2025	15 YRS 02 MOS
BERNABETH S. HO	PUBLIC WORKS Dept.#PW	04-16-2025	06 YRS 01 MOS
ELIZABETH B. HYETT	LACERA Dept.#NL	06-05-2025	22 YRS 08 MOS
CARIDAD JIMENEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-31-2025	15 YRS 05 MOS
PAMELA JOHNSON	SOUTHWEST CLUSTER (MLK JR MC) Dept.#HK	05-15-2025	22 YRS 04 MOS
VICTOR K. JONES	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-01-2025	15 YRS 08 MOS
DEBRA D. JONES	PARKS AND RECREATION Dept.#PK	04-28-2025	08 YRS 07½ MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
AUDREY D. JORDAN	SOUTHWEST CLUSTER (MLK JR MC) Dept.#HK	06-01-2025	10 YRS 05 MOS
BRYAN D. KING	COASTAL CLUSTER-HARBOR/UCLA MC Dept.#HH	05-27-2025	19 YRS 11½ MOS
SANJAY KUMAR	SUPERIOR COURT/COUNTY CLERK Dept.#SC	07-15-2025	03 YRS 06 MOS
DONNA F. LARRY	HEALTH SERVICES ADMINISTRATION Dept.#HS	06-03-2025	11 YRS 02 MOS
JANET T. LUONG	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-25-2025	26 YRS 00 MOS
DONNA M. MC CALLUM	SOUTHWEST CLUSTER (MLK JR MC) Dept.#HK	06-28-2025	16 YRS 05 MOS
THELMA A. MCCLINTON	PUBLIC HEALTH PROGRAM Dept.#PH	07-04-2025	07 YRS 08½ MOS
SUZANNE MCLEAN	CALIFORNIA CHILDREN'S SERVICES Dept.#PS	08-03-2025	16 YRS 10½ MOS
RENEE MIONE	MENTAL HEALTH Dept.#MH	06-27-2025	11 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
SONIA E. MOJICA	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	05-26-2025	05 YRS 02 MOS
VICKIE J. MORGAN	HEALTH SERVICES ADMINISTRATION Dept.#HS	06-09-2025	12 YRS 02 MOS
LISA T. PERALEZ	PROBATION DEPARTMENT Dept.#PB	05-31-2025	11 YRS 06 MOS
GLORIA M. PEREZ	BEACHES & HARBORS Dept.#BH	03-22-2025	01 YRS 08½ MOS
SYLVIA D. RHODES	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	06-18-2025	34 YRS 05½ MOS
GABRIELA SALINAS	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	08-26-2025	23 YRS 11½ MOS
BRADLEY J. SATO	SHERIFF Dept.#SH	06-30-2025	06 YRS 01 MOS
RITA C. SMITH	SHERIFF Dept.#SH	05-20-2025	11 YRS 03 MOS
GLENDA SMITH	DEPT OF PUBLIC SOCIAL SERVICES Dept.#SS	05-21-2025	14 YRS 07 MOS

# BOARD OF RETIREMENT MEETING OF JULY 10, 2025

## BENEFIT APPROVAL LIST

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

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHRISTOPHER O. STEWART	SHERIFF Dept.#SH	07-13-2025	10 YRS 03 MOS
DEREK A. STEWART	PROBATION DEPARTMENT Dept.#PB	06-25-2025	21 YRS 11½ MOS
GAYLEON TYLER	SHERIFF Dept.#SH	04-10-2025	11 YRS 10 MOS
JEANETTE H. VILLARREAL	PUBLIC WORKS Dept.#PW	06-29-2025	10 YRS 01 MOS
RENA A. VINYARD	PROBATION DEPARTMENT Dept.#PB	06-12-2025	11 YRS 08 MOS
HARTMUTH E. WALPUS	NORTHEAST CLUSTER (LAC+USC) Dept.#HG	07-09-2025	11 YRS 07 MOS
ERIN R. WINGER	SOUTHWEST CLUSTER (MLK JR MC) Dept.#HK	03-21-2025	02 YRS 08 MOS

**BOARD OF RETIREMENT MEETING OF JULY 10, 2025 RESCISSIONS/  
CHANGES FROM BENEFIT APPROVAL LIST  
APPROVED ON JUNE 4, 2025**

**GENERAL MEMBER APPLICATIONS FOR SERVICE RETIREMENT**

<b>NAME</b>	<b>DEPARTMENT</b>	<b>UPDATE</b>
SHARON M OLDS	CHILDREN & FAMILY SERVICES	RESCISSION OF RETIREMENT
RUDY RODRIGUEZ	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT
SHERYL M BEASLEY-WAIT	SUPERIOR COURT/COUNTY CLERK	CHANGE TO JULY 15, 2025
RAUL HERNANDEZ	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT



June 5, 2025

TO: Each Trustee  
Board of Retirement

FROM: Tamara Caldwell, Manager   
Disability Retirement Services Division

FOR: July 10, 2025, Board of Retirement Meeting

SUBJECT: **DISMISS WITH PREJUDICE THE APPEAL OF CARLOS H. FERNANDEZ**

Mr. Carlos H. Fernandez applied for a service-connected disability retirement on July 17, 2019. On May 5, 2021, the Board denied his application.

Mr. Fernandez's attorney filed a timely appeal. On May 19, 2025, the applicant's attorney advised LACERA that his client did not wish to proceed with the appeal for a service-connected disability retirement.

**IT IS THEREFORE RECOMMENDED THAT THE BOARD:**

Dismiss with prejudice Carlos H. Fernandez's appeal for a service-connected disability retirement.

NOTED AND REVIEWED:

  
Francis J. Boyd, Sr. Staff Counsel

Date: 06/05/2025

FJB:TC:rl

Attachment

THOMAS J. WICKE  
ROBERT J. SHERWIN  
GOLD D. LEE  
ADAM J. TURNER  
JUSTIN D. FELDMAN  
LAWRENCE D. ROSENBERG  
ANDREW DHADWAL  
JEFFREY S. SWARTZ  
NYRIE KAYEKJIAN EMURIAN  
TAMARA A. YERITSYAN  
RONALD PRASAD

**LEWIS, MARENSTEIN, WICKE, SHERWIN & LEE, LLP**

ATTORNEYS AT LAW

20750 VENTURA BOULEVARD

SUITE 400

WOODLAND HILLS, CALIFORNIA 91364-2338

TELEPHONE (818) 703-6000 • FAX (818) 703-0200

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MICHAEL Z. PEHLEVANIAN  
KELLI M. KRUPKA  
ARI L. EMURIAN

OF COUNSEL  
JANE OATMAN

MICHAEL B. LEWIS (RET.)  
ALAN B. MARENSTEIN (RET.)

MICHAEL T. ROBERTS  
(1942 – 2000)

May 19, 2025

John Rosenthal, Referee  
P.O. Box 6535  
Laguna Niguel, CA 92607

Re: CARLOS H. FERNANDEZ/DISABILITY RETIREMENT APPEAL  
Hearing Date: May 29, 2025  
[REDACTED] [REDACTED]

Dear Mr. Rosenthal:

After further consideration, our client Carlos Fernandez will not be pursuing his appeal in his request for a service-connected disability retirement with LACERA.

Please accept this letter as an official withdraw of his appeal.

By copy of this letter, we are advising Senior Staff Attorney Eugenia Der of our client's decision to withdraw the appeal.

Should you have any questions concerning this matter, please feel free to contact me.

Very truly yours,

LEWIS, MARENSTEIN, WICKE, SHERWIN & LEE LLP



THOMAS J. WICKE

TJW:mmj

cc: Eugenia Der, Senior Staff Counsel  
Kerri Wilson, LACERA  
Mr. Carlos Fernandez



June 5, 2025

TO: Each Trustee  
Board of Retirement

FROM: Tamara Caldwell, Manager   
Disability Retirement Services Division

FOR: July 10, 2025, Board of Retirement Meeting

SUBJECT: **DISMISS WITH PREJUDICE THE APPEAL OF MIGUEL A. VEGA, JR.**

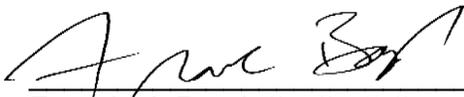
On October 17, 2024, Miguel A. Vega, Jr., was notified that he was subject to the felony-forfeiture statutes under Government Code section 7522.72 and 7522.74 because he was convicted of a job-related felony and had therefore forfeited all benefits accrued after April 13, 2020, the first commission date of the crime for which he was convicted. This forfeiture includes his right to a disability retirement.

Mr. Vega's attorney filed a timely appeal under LACERA's *Administrative Appeal Procedures for Felony Forfeiture*. On May 23, 2025, his attorney advised LACERA that her client was withdrawing his appeal.

**IT IS THEREFORE RECOMMENDED THAT THE BOARD:**

Dismiss with prejudice Miguel A. Vega, Jr.'s appeal of LACERA's decision that all benefits accrued after April 13, 2020, are forfeited under Government Code sections 7522.72 and 7522.74.

NOTED AND REVIEWED:



Francis J. Boyd, Sr. Staff Counsel

Date: 06/05/2025

FJB:TC:rl

Attachment

**From:** [Eugenia Der](#)  
**To:** [Kerri Wilson](#)  
**Cc:** [Paola Novo Araya](#)  
**Subject:** FW: Miguel Vega - Felony Forfeiture Appeal withdraw request  
**Date:** Friday, May 23, 2025 2:27:44 PM  
**Attachments:** [image002.png](#)

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Hi Kerri,

Please see the email below. Mr. Vega is withdrawing his felony forfeiture appeal. Please begin the withdrawal procedures. Thank you.

Eugenia W. Der  
Senior Staff Counsel, Disability Litigation



300 North Lake Ave.  
Pasadena, CA 91101  
Phone Number: (626) 564-2386  
Email: [eder@lacera.com](mailto:eder@lacera.com)

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**From:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Sent:** Friday, May 23, 2025 2:19 PM  
**To:** Eugenia Der <[EDer@lacera.com](mailto:EDer@lacera.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

**WARNING:** This email originated from outside of LACERA. Please do not click links or open attachments unless you recognize the sender and expect the message.

Hi Eugenia,

Mr. Vega is in agreement to withdrawing his appeal of the felony forfeiture. Please let me know if you need anything further or whether notification via this email will suffice.

Thank you,



**Kala Schmidt, Esq.**  
*Co-Founder & Partner*

**Tel:** (949) 844-5946  
**Fax :** (818) 272-8730  
**Email:** [kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)

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[www.legionlawgroup.com](http://www.legionlawgroup.com)

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**From:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Sent:** Friday, May 23, 2025 1:17 PM  
**To:** Eugenia Der <[EDer@lacara.com](mailto:EDer@lacara.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

Thanks Eugenia, this is greatly appreciated. I will communicate to Mr. Vega to get his final decision on how he wishes to proceed.



**Kala Schmidt, Esq.**  
**Co-Founder & Partner**

**Tel:** (949) 844-5946  
**Fax :** (818) 272-8730  
**Email:** [kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)

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**From:** Eugenia Der <[EDer@lacara.com](mailto:EDer@lacara.com)>  
**Sent:** Wednesday, May 21, 2025 9:59 AM  
**To:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

Hi Kala,

It was a pleasure speaking with you today. I actually discussed Mr. Vega's case with one of my colleagues after our call who pointed out another reason why I cannot bifurcate the felony feature appeal from the disability retirement appeal. Mr. Vega was determined to be ineligible for disability retirement because of the felony forfeiture, which is why Disability Retirement Services stopped processing his application once LACERA was notified of the felony conviction. So, he would have to win on the FF appeal first before we could move forward on the disability side.



[REDACTED]

[REDACTED]

I hope this helps.

Eugenia W. Der  
Senior Staff Counsel, Disability Litigation



300 North Lake Ave.  
Pasadena, CA 91101  
Phone Number: (626) 564-2386  
Email: [eder@lacera.com](mailto:eder@lacera.com)

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**From:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Sent:** Monday, May 19, 2025 9:47 AM  
**To:** Eugenia Der <[EDer@lacera.com](mailto:EDer@lacera.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

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Perfect, I will call you Wednesday

*JG – Can you add a call with Eugenia at 9 am on Wednesday to my calendar?*

Thank you!

**Kala Schmidt, Esq.**  
*Co-Founder & Partner*  
**Tel:** (949) 844-5946  
**Fax :** (818) 272-8730  
**Email:** [kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)



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**From:** Eugenia Der <[EDer@lacera.com](mailto:EDer@lacera.com)>  
**Sent:** Monday, May 19, 2025 9:44 AM  
**To:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

Hi Kala,

I have time this afternoon between 2 and 4 pm and Wednesday morning between 9-11 am.

Eugenia W. Der  
Senior Staff Counsel, Disability Litigation



300 North Lake Ave.  
Pasadena, CA 91101  
Phone Number: (626) 564-2386  
Email: [eder@lacera.com](mailto:eder@lacera.com)

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**From:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Sent:** Monday, May 19, 2025 9:39 AM  
**To:** Eugenia Der <[EDer@lacera.com](mailto:EDer@lacera.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

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Good morning Eugenia,

I hope all is well. I've had a chance to speak to my client and I'd like to speak with you about this matter, what day/time works best for you this week?

Thank you,



**Kala Schmidt, Esq.**  
*Co-Founder & Partner*

**Tel:** (949) 844-5946  
**Fax :** (818) 272-8730  
**Email:** [kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)

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**From:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Sent:** Thursday, May 15, 2025 5:13 AM  
**To:** Eugenia Der <[EDer@lacara.com](mailto:EDer@lacara.com)>  
**Cc:** Juliana Griggs <[jgriggs@legionlawgroup.com](mailto:jgriggs@legionlawgroup.com)>  
**Subject:** RE: Miguel Vega - Felony Forfeiture Appeal withdraw request

Hi Eugenia,

Thank you for letting me know. I will reach out to him to confirm, and then get back to you.

Thanks again,



**Kala Schmidt, Esq.**  
*Co-Founder & Partner*

**Tel:** (949) 844-5946  
**Fax :** (818) 272-8730  
**Email:** [kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)

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**From:** Eugenia Der <[EDer@lacera.com](mailto:EDer@lacera.com)>  
**Sent:** Wednesday, May 14, 2025 3:13 PM  
**To:** Kala M. Schmidt <[kschmidt@legionlawgroup.com](mailto:kschmidt@legionlawgroup.com)>  
**Subject:** Miguel Vega - Felony Forfeiture Appeal withdraw request

Hi Kala,

I just wanted to let you know that Mr. Vega called our Call Center earlier this week expressing a desire to withdraw his felony forfeiture appeal (or at least that was what was told to me.) Please let me know if he does intend to withdraw. If so, please send me a letter letting us know that you (and Mr. Vega) intend to withdraw your appeal. Thanks!

Eugenia W. Der  
Senior Staff Counsel, Disability Litigation



300 North Lake Ave.  
Pasadena, CA 91101  
Phone Number: (626) 564-2386  
Email: [eder@lacera.com](mailto:eder@lacera.com)

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June 30, 2025

TO: Each Trustee  
Board of Retirement

FROM: Tamara Caldwell, Division Manager  
Disability Retirement Services

SUBJECT: **APPEAL(S) FOR THE BOARD OF RETIREMENT'S MEETING  
OF JULY 10, 2025**

**IT IS RECOMMENDED** that the Board of Retirement grant the appeal(s) and request(s) for administrative hearing received from the following member(s), and direct the Disability Retirement Services Manager to refer each case to a referee:

4511	Scott W. Garrett	In Pro Per	Deny SCD – Grant NSCD
------	------------------	------------	-----------------------

5285B	Genieve R. Atkinson	In Pro Per	Deny SCD - Employer Can Accommodate
-------	---------------------	------------	--

TLC:kw

June 24, 2025

TO: Each Trustee  
Board of Retirement

FROM: Francis J. Boyd   
Senior Staff Counsel

FOR: July 10, 2025, Board of Retirement Meeting

**SUBJECT: SERVICE PROVIDER INVOICE APPROVAL REQUEST – WINET  
PATRICK GAYER CREIGHTON & HANES**

On January 1, 2015, the Board of Retirement adopted a policy whereby staff is authorized to approve and pay vendor invoices up to a cumulative amount of \$15,000.00 per vendor. Invoices from vendors exceeding \$15,000.00 per case shall be submitted to the Board of Retirement for approval prior to payment.

Jennifer Creighton at Winet Patrick Gayer Creighton & Hanes was hired to investigate and process a disability-retirement application filed by a LACERA employee. This confidential file is identified as 2H2024K.

Currently, Ms. Creighton's firm has been paid \$10,918.71 for services provided. Enclosed is her most recent invoice totaling \$9,228.65. The charges are appropriate given the complexity of the issues presented in this disability-retirement application.

**IT IS THEREFORE RECOMMENDED THAT** the Board approve the service provider invoice for Winet Patrick Gayer Creighton & Hanes.

FJB:rl

Confidential Attachment



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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**



June 24, 2025

TO: Each Trustee  
Board of Retirement

FROM: Kathy Delino *KD*  
Chief, Information Technology

FOR: July 10, 2025, Board of Retirement Meeting

SUBJECT: Mainframe Hosting Contract Renewal: Mainline Information Systems in partnership with Data Management Inc.

### **RECOMMENDATION**

It is recommended that the Board of Retirement authorize LACERA to renew our contract for hosting LACERA's mainframe technology with Mainline Information Systems in partnership with Data Management Inc. at an annual cost of \$446,100 and a three-year cost of \$1,338,300.

### **EXECUTIVE SUMMARY**

This memo recommends renewing LACERA's mainframe hosting contract with Mainline Information Systems and Data Management Inc. (DMI) for a three-year term. This renewal ensures the continued stability, security, and availability of LACERA's legacy systems while we execute our strategic plan to retire the mainframe platform within the same timeframe.

Since transitioning to the hosted environment in 2021, LACERA has benefited from a highly resilient infrastructure, 24/7 monitoring, and enhanced disaster recovery capabilities. These services have significantly improved our Recovery Point and Recovery Time Objectives, ensuring uninterrupted operations and safeguarding member data.

The proposed renewal supports our phased migration to the Pension Administration System and modern computing platforms. It provides the necessary continuity and risk mitigation to maintain critical services during this transition. Funding for the contract has been allocated in the Fiscal Year 2025–26 budget and will continue through the mainframe's planned decommissioning.

### **BACKGROUND**

In 2021, LACERA moved its mainframe operations from Pasadena to a hosting provider in Phoenix, AZ in partnership with Mainline Information Systems and Data Management. Since then, DMI has provided a resilient and secure hosting environment that ensures the continuous availability of our systems. With 24/7 monitoring, robust data security, and offsite replication, DMI has significantly strengthened our operational stability and disaster recovery capabilities.

Thanks to DMI's advanced asynchronous replication, we've achieved substantial improvements in both our RPO (Recovery Point Objective) and RTO (Recovery Time Objective), minimizing potential data loss and downtime.

In the years since our initial engagement, Mainline and DMI have consistently delivered exceptional support for our mainframe operations. Their commitment to service excellence, often going above and beyond by providing additional resources, has been instrumental in maintaining uninterrupted business operations.

### **LACERA'S MAINFRAME STRATEGY**

While LACERA's mainframe is critical to fulfilling our mission today, we plan to retire this technology in three years. While it has been a reliable workhorse for the organization, there are no longer enough applications running on it to justify its expense. In addition, there is an established Pension Administration System to which the remaining programs and data will be migrated.

### **SOLE SOURCE JUSTIFICATION**

Renewing this contract through a single-source procurement is both practical and strategically necessary. Mainline Information Systems and DMI have developed a deep operational understanding of LACERA's legacy systems and hosting requirements over the past several years. Transitioning to a new provider at this critical juncture would introduce significant risk, including potential service disruptions, data migration challenges, and increased costs associated with onboarding and knowledge transfer. Given the planned decommissioning of the mainframe within three years, maintaining continuity with our current provider ensures stability, minimizes risk, and supports the successful execution of our long-term Information Technology (IT) strategy.

### **IT IS THEREFORE RECOMMENDED**

That the Board of Retirement authorize LACERA to renew our contract for hosting LACERA's mainframe technology with Mainline Information Systems in partnership with Data Management Inc. at an annual cost of \$446,100.00 and a three-year cost of \$1,338,300. These funds have been allocated in the Fiscal Year 2025–26 budget and will continue until the mainframe is migrated to a modern computing platform and then decommissioned.

Noted and Reviewed:



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Laura Guglielmo  
Assistant Executive Officer

- CC: Ricki Contreres  
Elsy Gutierrez  
Ganesh Gopanapalli  
Eddie Paz  
Vasu Kuppuswamy



June 24, 2025

TO: Each Trustee  
Board of Retirement

FROM: Luis A. Lugo *LL*  
Deputy Chief Executive Officer

Kathy Delinoh *KD*  
Chief, Information Technology

FOR: July 10, 2025, Board of Retirement Meeting

SUBJECT: Microsoft Contract Ratification (3-Year Renewal: FY 2025-28)

## **RECOMMENDATION**

That the Board of Retirement ratifies the LACERA Amendment to the Licensed Support Provider Agreement No. ITARC-00929 for Microsoft Products and Services Under Microsoft EA No. 8084445 between County of Riverside and Softchoice Corporation, executed on June 24, 2025, by Deputy Chief Executive Officer Luis A. Lugo. The total three-year value of this agreement is \$2,169,190.37, distributed as follows: Year 1 - \$719,259.29, Year 2 - \$724,971.79, and Year 3 - \$724,959.29.

## **BACKGROUND**

LACERA procures our Microsoft licenses through a third-party Value-Added Reseller (VAR). This process offers the organization several advantages such as cost savings, integration and customization services that help maximize the value of our Microsoft licenses. LACERA's current contract covers the licensing expenses for all Microsoft Enterprise products including Microsoft Word, Excel, Outlook, Visio, Teams, SharePoint, Intune, Power BI, Power Apps, Power Automate, Project, SQL Server, and CoPilot Search. The current three-year contract is set to expire on June 30, 2025.

## **EXECUTIVE SUMMARY**

In March 2025, LACERA began looking for a new Value-Added Reseller (VAR) due to the expiring agreement. Due to time constraints, Vendor Management engaged authorized VARs under the County of Riverside Master Service Agreement with the intent to select a new VAR under a Leverage Purchase Agreement (LPA). Softchoice Corporation was selected as the lowest bidder with the most favorable terms. An LPA is a strategic purchasing method that allows LACERA to procure goods or contract services using existing contracts competitively bid and negotiated by other public agencies. Purchases utilizing LPAs or any agreement are not considered sole source purchases; they are agreement purchases.

RE: Microsoft Contract Ratification (3-Year Renewal: FY 2025-28)

June 24, 2025

Page 2

The use of an LPA offers benefits such as reducing cost, expediting procurement processes, and leveraging the purchasing power of larger entities. This approach aligns with LACERA's commitment to operational efficiency and fiscal responsibility.

According to LACERA's Policy for Procurement of Goods and Services (PGS), approved by the Board of Retirement on September 4, 2024, contracts exceeding \$500,000 require the signature of the Chief Executive Officer or Authorized Designee (Deputy Chief Executive Officer or Assistant Executive Officer) with Board Approval. To avoid service interruption, vendor management initiated the execution of the contract prior to Board approval because the next Board meeting was scheduled for July 10, 2025, several weeks after the existing agreement terminated. However, the contract was reviewed and approved by legal counsel and the Executive Office with confirmed sufficient budgeted funds.

In the course of implementing our new centralized vendor management program, Administrative Services updated LACERA's procurement policy. Under the previous procurement policy, Board approval was not sought for contracts and projects that were approved as part of LACERA's Administrative Budget. However, the new policy requires Board approval for all contracts whose full-term values exceed a defined threshold, except in cases of emergency. As a result, this amendment must be ratified by the Board. Moreover, checklists and longer lead times will be utilized to ensure compliance with these requirements moving forward.

**IT IS THEREFORE RECOMMENDED** THAT the Board of Retirement ratifies the LACERA Amendment to the Licensed Support Provider Agreement No. ITARC-00929 for Microsoft Products and Services Under Microsoft EA No. 8084445 between County of Riverside and Softchoice Corporation, executed on June 24, 2025, by Deputy Chief Executive Officer Luis A. Lugo. The total three-year value of this agreement is \$2,169,190.37, distributed as follows: Year 1 - \$719,259.29, Year 2 - \$724,971.79, and Year 3 - \$724,959.29.

Noted and Reviewed:



---

Laura Guglielmo  
Assistant Executive Officer

CC: Ricki Contreres  
Summy Voong  
Jim Lyle



June 27, 2025

TO: Each Member

FROM: Louis Gittens *LG*  
Division Manager, Benefits Division

FOR: Board of Retirement Meeting of July 10, 2025

SUBJECT: **Application of Kathleen M. Cady for Reinstatement to Active Membership Pursuant to Government Code Section 31680.4 and 31680.5**

**RECOMMENDATION:**

It is recommended that the Board of Retirement:

1. Determine, based upon medical evaluation conducted May 21, 2025, that Kathleen M. Cady is not incapacitated for the duties assigned to her in the position of Assistant Bureau Chief, DA; and
2. Grant the application of Kathleen M. Cady for reinstatement to active membership.

**Discussion:**

Government Code Sections 31680.4 and 31680.5 permit a retired member to be re-employed by the County and reinstated as an active member of LACERA if the Board of Retirement, based upon medical examination, determines that the member is not incapacitated for the assigned duties. The member's retirement allowance would be suspended immediately upon re-employment. Reinstatement to active membership becomes effective on the first day of the month following the date of re-employment. The returning member would only be eligible for a retirement plan that is currently available for new members regardless of the member's prior retirement plan.

Kathleen M. Cady was employed by the Los Angeles County District Attorney's Office. She retired on March 30, 2019. The Los Angeles County District Attorney's Office now wishes to re-employ Kathleen M. Cady as a permanent Assistant Bureau Chief, DA, UC, (Item #9957).

Under CERL 31680.5, all reinstated general members are entitled to a retirement allowance, upon subsequent retirement, "determined as if the member were first entering the system." Thus, this member is only eligible for Retirement Plan G General. Note that the member was in Plan D for her past membership period and will be in Plan G General for her new membership period, if approved for reinstatement.

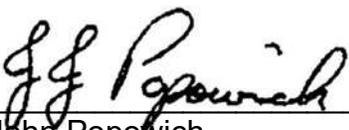
Attached are copies of documents prepared in support of the member's application for reinstatement:

- The June 26, 2025 letter from the County of Los Angeles, Chief Executive Office confirming the Board of Supervisor's Constructive Approval of the request to re-employ the member. (Attachment 1)
- The June 3, 2025 letter from the Los Angeles County District Attorney's Office to the LACERA requesting re-employment as an Assistant Bureau Chief, DA, UC, (Item #9957) with the Los Angeles County District Attorney's Office. (Attachment 2)
- The May 6, 2025 letter from the member to LACERA requesting re-employment as an Assistant Bureau Chief, DA, UC, (Item #9957) with the Los Angeles County District Attorney's Office (Attachment 3)
- The member's Medical Clearance report signed on May 21, 2025, finding the member not incapacitated for the proposed duties. (Attachment 4)

**IT IS THEREFORE RECOMMENDED THAT YOUR BOARD:**

1. Determine, based upon medical evaluation conducted May 21, 2025, that Kathleen M. Cady is not incapacitated for the duties assigned to her in the position of Assistant Bureau Chief, DA; and
2. Grant the application of Kathleen M. Cady for reinstatement to active membership.

**REVIEWED AND APPROVED:**



John Popowich  
Assistant Executive Officer

Di\ben\retstaff\Cady, Kathleen M.doc

Attachments



**Chief  
Executive  
Office.**

**COUNTY OF LOS ANGELES  
BUDGET AND OPERATIONS MANAGEMENT BRANCH**

Kenneth Hahn Hall of Administration  
500 West Temple Street, Room 750, Los Angeles, CA 90012  
ceo.lacounty.gov      budget@ceo.lacounty.gov

**CHIEF EXECUTIVE OFFICER**  
Fesia A. Davenport

**SENIOR ASSISTANT CHIEF EXECUTIVE OFFICER**  
Mason Matthews

June 26, 2025

**Board's Constructive Approval**

Manager, Claims Processing Division  
Los Angeles County Employee Retirement Association  
300 N. Lake Avenue  
Pasadena, CA 91101

**RE: KATHLEEN M. CADY**

To whom it may concern:

The Chief Executive Office submitted a memorandum to the Los Angeles County Board of Supervisors on April 14, 2025, requesting authorization to re-employ and reinstate the above-referenced retired employee.

There was no inquiry, formal action, or objections from Board offices by the two-week deadline of April 28, 2025. Therefore, in accordance with Board of Supervisor Policy 9.150, all parties should understand that the Board's constructive approval to proceed has been obtained, and the Los Angeles County District Attorney's Office and the Los Angeles County Employee Retirement Association may proceed with associated arrangements for re-employment and reinstatement of the above-mentioned employee.

**Policy 9.150**

The County may hire former retired County employees to permanent positions on an indefinite basis. The Board's action provides the County with an additional management tool to fill critical, emergent or hard to fill positions which require special skills, training and experience or certification and may not be reasonably filled by other than the County retiree. Such authorizations must be approved by the Board of Supervisors. Departments are to submit a Board memo to their Chief Executive Office (CEO) budget analyst prior to filling any position on an indefinite basis with a County retiree. The memo, with CEO recommendation, will be forwarded to the Board for approval, stating that a two-week period exists for a Board member to request formal action prior to filling the position.

**Attachment 1**



Manager, Claims Processing Division  
June 26, 2025  
Page 2

The retired employee being hired must cancel his/her retirement allowance through the Board of Retirement until termination of the new re-employment. This policy does not replace the statute which allows rehiring retired county employees temporarily for up to 120 days per fiscal year.

Retirees under the Early Separation Plan are not eligible to fill these positions without direct Board approval.

If you have any questions or need additional information, please contact me or Bryan W. Bell at (213) 974-4150 or [bbell@ceo.lacounty.gov](mailto:bbell@ceo.lacounty.gov).

Sincerely,

A handwritten signature in cursive script that reads "Brian Hoffman".

Brian Hoffman, Manager  
Chief Executive Office

BH:BWB:cc

c: District Attorney



LOS ANGELES COUNTY DISTRICT ATTORNEY'S OFFICE  
BUREAU OF ADMINISTRATIVE SERVICES

NATHAN J. HOCHMAN • District Attorney  
STEVEN I. KATZ • Chief Deputy District Attorney  
CHRISTINA BUCKLEY • Assistant District Attorney

NAVJOT KAUR • Administrative Deputy, DA

June 3, 2025

Los Angeles County Employees Retirement Association  
Manager, Benefits Division  
PO Box 7060  
Pasadena, CA 91109

Dear Manager:

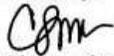
Kathleen Cady, Employee # 260071, SSN [REDACTED] retired from County service as a Deputy District Attorney IV (DDA IV) on March 30, 2019.

The Los Angeles County District Attorney's Office intends to re-employ Ms. Cady as a permanent Assistant Bureau Chief, DA, UC, item # 9957, in accordance with Government Code Section 31680.4. We have secured all the necessary approvals from the Chief Executive Office and the Board of Supervisors to rehire Ms. Cady. The approved documents are attached.

Upon re-employment, Ms. Cady will serve as the Director of the Bureau of Victim Services (BVS). This position is critical to the District Attorney's Office, and Ms. Cady has extensive experience and subject matter expertise in victims' rights and services and will provide strategic direction and leadership as the Department seeks to strengthen and reorganize the BVS.

I understand that the Department may re-employ Ms. Cady only upon approval of the submitted documents named above, and the approval of the Board of Retirement.

Sincerely,

  
Chavon Smith, Chief  
Human Resources Division  
Los Angeles, CA 90012  
(213) 257-2701

RECEIVED  
JUN 06 2025  
MS-DROPBOX

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211 West Temple Street  
Suite 200  
Los Angeles, CA 90012  
(213) 257-2751

Attachment 2

May 6, 2025

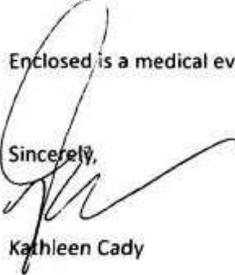
LACERA  
Manager, Benefits Division  
PO Box 7060  
Pasadena, CA 91109

Dear Manager:

I wish to be re-employed as a permanent employee. This letter is to request that my monthly retirement be suspended and that I be re-employed as a Assistant Bureau Chief with the District Attorney's Office pursuant to Government Code 31680.4.

Enclosed is a medical evaluation stating that I am not incapacitated for the duties I will be performing.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kathy Cady', written over the word 'Sincerely,'.

Kathleen Cady

Attachment 3

**REEMPLOYMENT AND REINSTATEMENT TO ACTIVE LACERA  
MEMBERSHIP**

SECTION C - MEDICAL AFFIDAVIT PURSUANT TO CERL SECTION 31680.4 or 31680.8

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On May 21, 2025, the undersigned, conducted or oversaw the  
<date of medical examination>,

medical examination of Kathleen Cady  
<Name of Retiree>

pursuant to Section 31680.4 or 31680.8 of the County Employees Retirement Law, in connection with  
this Retiree's application to be re-employed as:

Assistant Bureau Chief  
<Prospective Job Title>.

I have also reviewed the Class Specification for this position. Based on this examination, I find that this  
individual is not incapacitated for the duties assigned to this position. A copy of the medical  
examination report is retained at Los Angeles County's Occupational Health Programs.

Signature of Physician performing or overseeing medical examination:

*Kenichi Carrigan, MD*

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Print Name and Title of Physician:

Ken Carrigan, MD

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Date Signed:

May 21, 2025

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Page 3 of 3



June 25, 2025

TO: Each Trustee,  
Board of Retirement

FROM: Ted Granger *TJ*  
Chief Financial Officer

FOR: July 10, 2025 Board of Retirement Meeting

SUBJECT: **2025 STAR COLA OVERVIEW**

At the request of the Board of Retirement, LACERA staff, in collaboration with LACERA's consulting actuary, Milliman, has prepared a presentation to provide an overview of the Supplemental Targeted Adjustment for Retirees Cost-Of-Living Adjustment (STAR COLA) program. This presentation also includes information regarding the annual statutory Cost-Of-Living Adjustment (COLA) benefit due to its direct relationship with the STAR COLA program.

Attachment

- I. STAR COLA Overview presentation dated July 10, 2025

**REVIEWED AND APPROVED:**

Luis A. Lugo  
Deputy Chief Executive Officer

06/25/2025

Date

LL: TG  
2025 STAR COLA Overview

- c: Board of Investments, LACERA
- |                 |                 |
|-----------------|-----------------|
| Jonathan Grabel | Laura Guglielmo |
| JJ Popowich     | Steven P. Rice  |



# STAR COLA Overview

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**July 10, 2025**

**Board of Retirement Meeting**

Ted Granger, LACERA

Craig Glyde, Milliman



# 01 Agenda

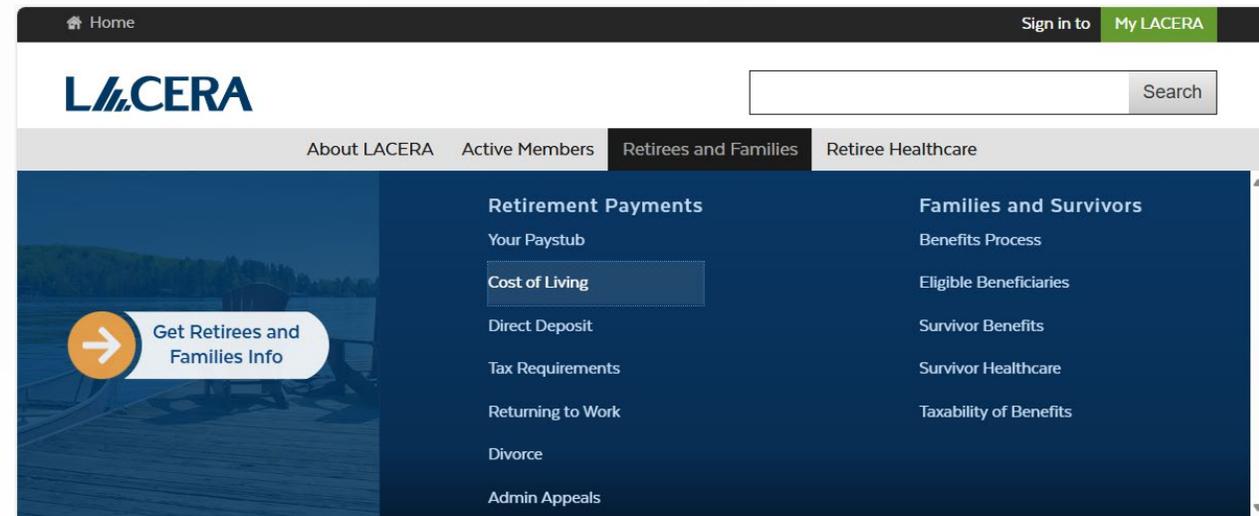
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Discussion Topics



## Discussion Topics

1. Agenda
2. COLA Programs
3. STAR COLA
4. STAR Reserve
5. Appendix
  - a) Terminology
  - b) Statutory COLA
  - c) Accumulation Accounts
  - d) Funding





# 02 COLA Programs

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COLA and STAR COLA



## COLA Program Comparison

Statutory COLA	STAR COLA
Annual Cost-of-Living Adjustment (COLA) Program	Supplemental Targeted Adjustment for Retirees (STAR) Cost-of-Living Adjustment (COLA) Program
Statutorily mandated award effective April 1 <sup>st</sup>	Discretionary benefit effective January 1 <sup>st</sup>
Dependent upon prior year change in Consumer Price Index (CPI)	Dependent upon COLA Accumulation account balances when they exceed 20%
CPI changes above Plan maximums are added to COLA Accumulation account	Accumulation accounts receive “excess” CPI amounts which are tracked by retirement plan and retirement year
COLA awards can be increased by deducting amounts from the COLA Accumulation when CPI changes below Plan maximums	Accumulation balances above 20% can be awarded under the permanent method which reduces COLA Accumulation account
Available for all retirees and their beneficiaries (Legacy and PEPRAs Plans, including Plan E)	Available for contributory plan retirees and their beneficiaries (Legacy and PEPRAs Plans, excluding Plan E)
Board of Retirement approval to increase benefits	Board of Retirement approval of costs and benefits
Benefits pre-funded through retirement contributions and paid from the Employer and Employee Reserve	Ad-hoc benefits paid from the Employer and Employee Reserve and permanent benefits paid from the STAR Reserve



## Cost-of-Living Adjustment (COLA) Program

### Retirement Benefit Enhancement

- Retirement law allows for annual retirement benefit increase based upon prior year inflation

### Goal

- Maintain the value of the retirement benefit consistent with local inflation

### Application

- Measure the prior year change in consumer price inflation (CPI) for the Los Angeles region
- Determine COLA Award with Board approval
- Update Accumulation Accounts

### Example A:

Consumer Price Index Change	Plan Maximum / COLA Award	Excess CPI to Accumulation Account
3.4%	2.0%	+1.4%

### Example B:

Consumer Price Index Change	Plan Maximum / COLA Award	Excess CPI from Accumulation Account
0.5%	2.0%	-1.5%

### Timing

- Board of Retirement approval, effective April 1<sup>st</sup>



## Supplemental Targeted Adjustment for Retirees (STAR) COLA Program

### Retirement Benefit Enhancement

- Retirement law allows for annual review of COLA Accumulation (Bank) balances
- Discretionary retirement benefit increase based upon accumulation of inflation amounts not previously awarded

### Goal

- Maintain the purchasing power of the retirement benefit when it goes below 80% of its original value
- Accumulation Account exceeds 20%, the excess amount can be awarded to retirees

### Application

- Review Accumulation Account balances (member eligibility and cost)
- Obtain Board approval and award method (ad-hoc or permanent)
- Update Accumulation Accounts

### Purchasing Power Examples:

Purchasing Power	Accumulation Account Balance (Excess CPI)	Purchasing Power
100%	-21.4%	78.6%
78.6%	+1.4%	80.0%

### STAR COLA Award Example:

Accumulation Account Balance (Excess CPI)	STAR COLA Eligibility / Award	Accumulation Account Balance (Excess CPI)
21.4%	-1.4%	20.0%

### Timing

- Board of Retirement approval of cost and award, effective January 1<sup>st</sup>



[PRELIMINARY]

## STAR COLA Accumulation

(4/1/1977 to 3/31/2025)

Accumulation balance is based upon:

- >Retirement plan
- >Retirement date

STAR COLA Accumulation Chart					
Percentages as of January 1, 2026					
Retirement Date		General Plans B, C, D and Safety Plan B			
		COLA % Accumulation April 1, 2025	STAR Benefit Adjustment 2026	COLA % Accumulation January 1, 2026	
Before 4/1/77		-	-	-	
4/1/1977	- 3/31/1978	21.4	(1.4)	20.0	
4/1/1978	- 3/31/1979	21.4	(1.4)	20.0	
4/1/1979	- 3/31/1980	21.4	(1.4)	20.0	
4/1/1980	- 3/31/1981	21.4	(1.4)	20.0	
4/1/1981	- 3/31/1982	21.4	(1.4)	20.0	
4/1/1982	- 3/31/1983	21.4	(1.4)	20.0	
4/1/1983	- 3/31/1984	21.4	(1.4)	20.0	
4/1/1984	- 3/31/1985	21.4	(1.4)	20.0	
4/1/1985	- 3/31/1986	21.4	(1.4)	20.0	
4/1/1986	- 3/31/1987	21.4	(1.4)	20.0	
4/1/1987	- 3/31/1988	21.4	(1.4)	20.0	
4/1/1988	- 3/31/1989	21.4	(1.4)	20.0	
4/1/1989	- 3/31/1990	21.4	(1.4)	20.0	
4/1/1990	- 3/31/1991	21.4	(1.4)	20.0	
4/1/1991	- 3/31/1992	21.4	(1.4)	20.0	
4/1/1992	- 3/31/1993	21.1	(1.1)	20.0	
4/1/1993	- 3/31/1994	21.1	(1.1)	20.0	
4/1/1994	- 3/31/1995	21.1	(1.1)	20.0	
4/1/1995	- 3/31/1996	21.1	(1.1)	20.0	
4/1/1996	- 3/31/1997	21.1	(1.1)	20.0	
4/1/1997	- 3/31/1998	21.1	(1.1)	20.0	
4/1/1998	- 3/31/1999	21.1	(1.1)	20.0	
4/1/1999	- 3/31/2000	21.1	(1.1)	20.0	
4/1/2000	- 3/31/2001	20.8	(0.8)	20.0	

STAR COLA Accumulation Chart					
Percentages as of January 1, 2026					
Retirement Date		General Plans B, C, D and Safety Plan B			
		COLA % Accumulation April 1, 2025	STAR Benefit Adjustment 2026	COLA % Accumulation January 1, 2026	
4/1/2001	- 3/31/2002	19.1	*	19.1	
4/1/2002	- 3/31/2003	19.0	*	19.0	
4/1/2003	- 3/31/2004	17.3	*	17.3	
4/1/2004	- 3/31/2005	17.3	*	17.3	
4/1/2005	- 3/31/2006	14.9	*	14.9	
4/1/2006	- 3/31/2007	13.7	*	13.7	
4/1/2007	- 3/31/2008	13.7	*	13.7	
4/1/2008	- 3/31/2009	13.7	*	13.7	
4/1/2009	- 3/31/2010	13.7	*	13.7	
4/1/2010	- 3/31/2011	13.7	*	13.7	
4/1/2011	- 3/31/2012	13.7	*	13.7	
4/1/2012	- 3/31/2013	13.7	*	13.7	
4/1/2013	- 3/31/2014	13.7	*	13.7	
4/1/2014	- 3/31/2015	13.7	*	13.7	
4/1/2015	- 3/31/2016	13.7	*	13.7	
4/1/2016	- 3/31/2017	13.7	*	13.7	
4/1/2017	- 3/31/2018	13.7	*	13.7	
4/1/2018	- 3/31/2019	12.1	*	12.1	
4/1/2019	- 3/31/2020	10.9	*	10.9	
4/1/2020	- 3/31/2021	10.4	*	10.4	
4/1/2021	- 3/31/2022	10.4	*	10.4	
4/1/2022	- 3/31/2023	5.8	*	5.8	
4/1/2023	- 3/31/2024	2.9	*	2.9	
4/1/2024	- 3/31/2025	1.4	*	1.4	

\* Not eligible for STAR COLA increase in 2026

Note: Plan E members are not eligible for the STAR COLA Program benefits



# 03 STAR COLA

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## Overview



## STAR COLA

### Process Outline

- 1. September: STAR COLA Cost**
  - Review COLA Accumulation Account balances
  - Obtain letter from Consulting Actuary
    - Confirm eligibility
    - Calculate cost
- 2. October: STAR COLA Award**
  - Deny or Approve STAR COLA
  - Ad-Hoc Benefit, OR
  - Permanent Benefit
- 3. Update Accumulation (Bank) Account balances**
- 4. STAR COLA effective January 1<sup>st</sup>**

### STAR COLA

Retirement Payments

Your Paystub

Cost of Living

COLA Accumulation

▶ STAR COLA

Direct Deposit

Tax Requirements

Returning to Work

Divorce

Admin Appeals

The Supplemental Targeted Adjustment for Retirees (STAR) is a cost-of-living adjustment (COLA) program designed to ease the effects of inflation for retirees and eligible survivors whose allowance has lost more than 20 percent of its purchasing power since retirement. The STAR COLA program is available for contributory plan retirees and their beneficiaries only; Plan E retirees are not eligible.

#### 2025 STAR COLA Awarded

Effective January 1, 2025, eligible members (or their survivors) will receive a permanent increase to their monthly retirement allowance. This adjustment will be reflected on the January 31, 2025, payment. The STAR COLA amounts are based on the following criteria:

- General Plan B, C, D, and Safety Plan B members (or their survivors) who retired prior to March 31, 1991: 1.5 percent increase
- General Plan B, C, D, and Safety Plan B members with a retirement date between April 1, 1991, and March 31, 1992: 0.3 percent increase



## STAR COLA Steps

STEP

1

General Plan D Member  
Retired in June 1990

STEP

2

April 1, 2024 Accumulation Account  
Balance of 21.5%

STEP

3

January 1, 2025 STAR Benefit Adjustment (Permanent)  
Accumulation Balance reduced from (-1.5%) from 21.5% to 20.0%



## STAR COLA Steps

STEP

4

April 1, 2025, Statutory COLA for Plan D Members  
CPI was 3.4% and Statutory COLA was 2.0%

STEP

5

Accumulation Account increased by 1.4%  
Difference between CPI of 3.4% and Statutory COLA of 2.0%

STEP

6

Accumulation Account balance  
 $21.5\% \text{ (APR 2024)} - 1.5\% \text{ (2025 STAR COLA)} + 1.4\% \text{ (April 2025)} = 21.4\%$



## STAR COLA Steps

STEP

7

Accumulation Account Balance: 21.4% > 20.0%  
Eligible for STAR COLA benefit in 2026

STEP

8

STAR COLA Award (upon BOR Approval)  
Possible increase benefit 1.4%, effective January 1, 2026  
Ad-Hoc Award – Paid for 2026 Only, Permanent Award – Paid for Lifetime

STEP

9

Accumulation Account Balance  
Ad-Hoc Award: Remain at 21.4% / Permanent Award: Reduce to 20.0%



# 04 STAR Reserve

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Analysis and Projections



## STAR COLA Award Methods

Government Code<sup>1</sup> provisions allow the Board of Retirement to award additional benefits to address the inflation experienced by retirees using one of the following approaches:

Ad-Hoc STAR COLA	Permanent STAR COLA
Temporary benefit for the current calendar year	Permanent benefit for the calendar year and future years
STAR benefit not included in the calculation of future statutory April 1 <sup>st</sup> COLA awards	STAR Benefit increases base retirement allowance and is included in the calculation of future statutory April 1 <sup>st</sup> COLA awards
COLA Accumulation Account balance not reduced, remains at current level and future amounts are added	COLA Accumulation Account balance is reduced to 20% level
Subject to Board of Retirement approval each year in future years	Board of Retirement does <u>not</u> need to approve these benefits in future years
Benefits paid from STAR Reserve	Benefits funded by one-time transfer from STAR Reserve then paid from Employer Reserves



## STAR Reserve

### STAR Reserve Impact

- **STAR COLA Program cost paid from STAR Reserve**
  - Permanent award: amount transferred from STAR Reserve to the Employer Reserves
  - Ad-Hoc award: benefits paid from STAR Reserve
  
- **STAR Reserve:**
  - Balance not included in Valuation Assets and does not receive interest credits
  - STAR COLA benefits not yet approved are not included in liabilities<sup>1</sup>
  
- **STAR COLA Award:**
  - Reduces STAR Reserve Balance
  - No change to unfunded liability

<sup>1</sup> The valuation liabilities do not account for STAR COLAs that may be granted in the future. STAR COLA benefits previously approved by the BOR are included in liabilities, offset by STAR Reserve asset transfers.

STAR Reserve Balance (Dollars in Millions)	
FYE 2024 Ending Balance	\$ 608.6
2025 STAR Award (Permanent)	\$ (1.6)
FYE 2025 Ending Balance	\$ 607.0
2025 STAR Award (Permanent) <sup>2</sup>	\$ 1.6
2025 STAR Award (Ad-hoc) <sup>2</sup>	\$ 0.2

<sup>2</sup> Per Government Code Section 7507, costs must be calculated by an actuary and disclosed to the public prior to a decision to adopt the benefit increase.



## STAR Reserve and Projections

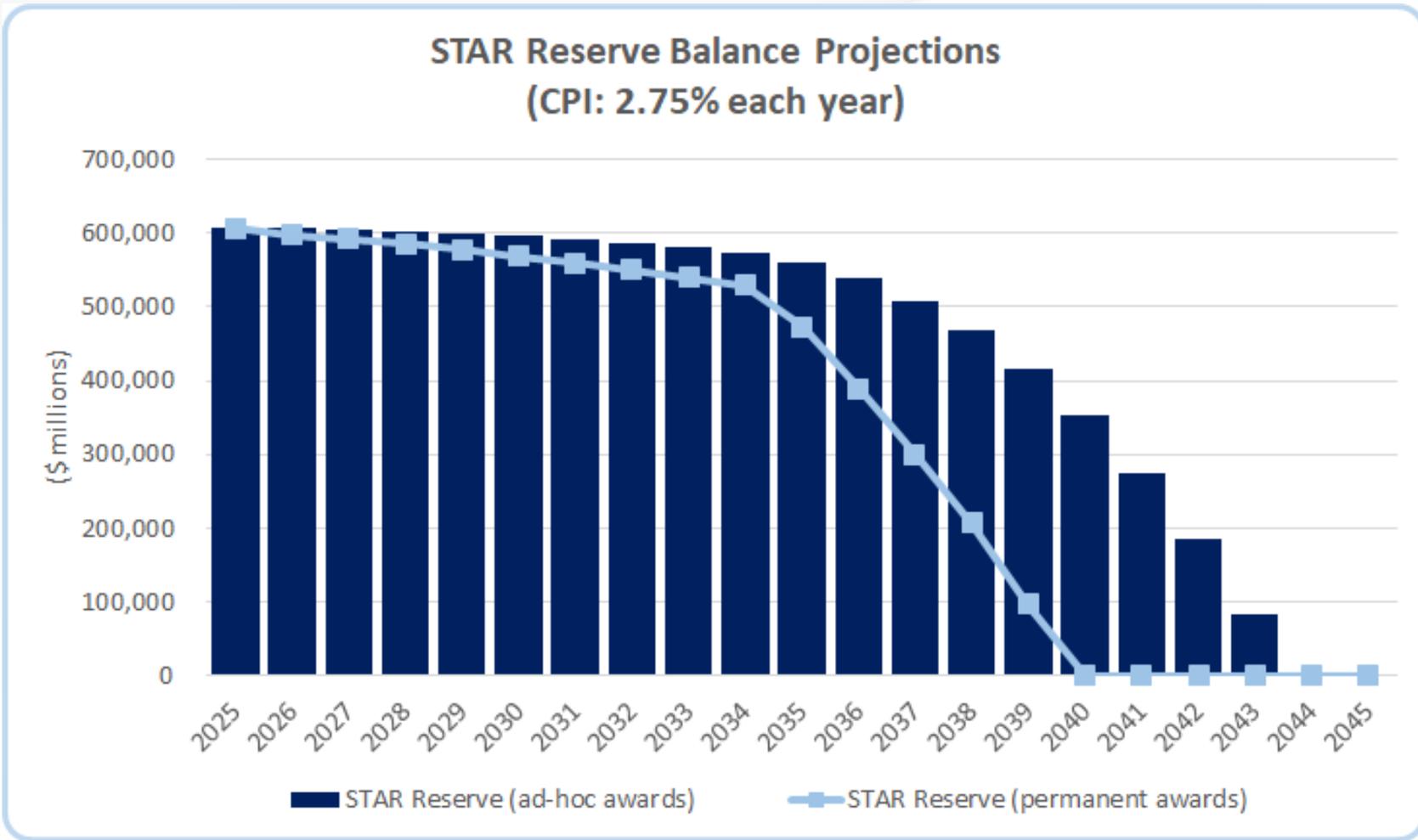
- ❑ Full details of 2026 STAR COLA will be provided in our upcoming letter
- ❑ Objective – Estimate STAR Reserve depletion year, and sensitivity to CPI

### Projection Scenarios, Methods and Assumptions

- ❑ Based on June 30, 2024 actuarial valuation
- ❑ Incorporating April 2025 COLA Accumulation Accounts
- ❑ Projecting future STAR payments under two different future CPI scenarios
  - ❑ Scenario 1: 2025 & later year's CPI = 2.75% per year (valuation assumption)
  - ❑ Scenario 2: 2025 – 2027 CPI = 4% per year; then 2.75% per year in 2028+
    - ❑ Los Angeles area CPI YTD through May 31, 2025 = 2.5%



## Scenario 1: 2025 & later year's CPI = 2.75% per year



### Ad-hoc Payments

- STAR Reserve depletes in 2044
- All STAR benefits stop; no future benefits

### Permanent Transfers

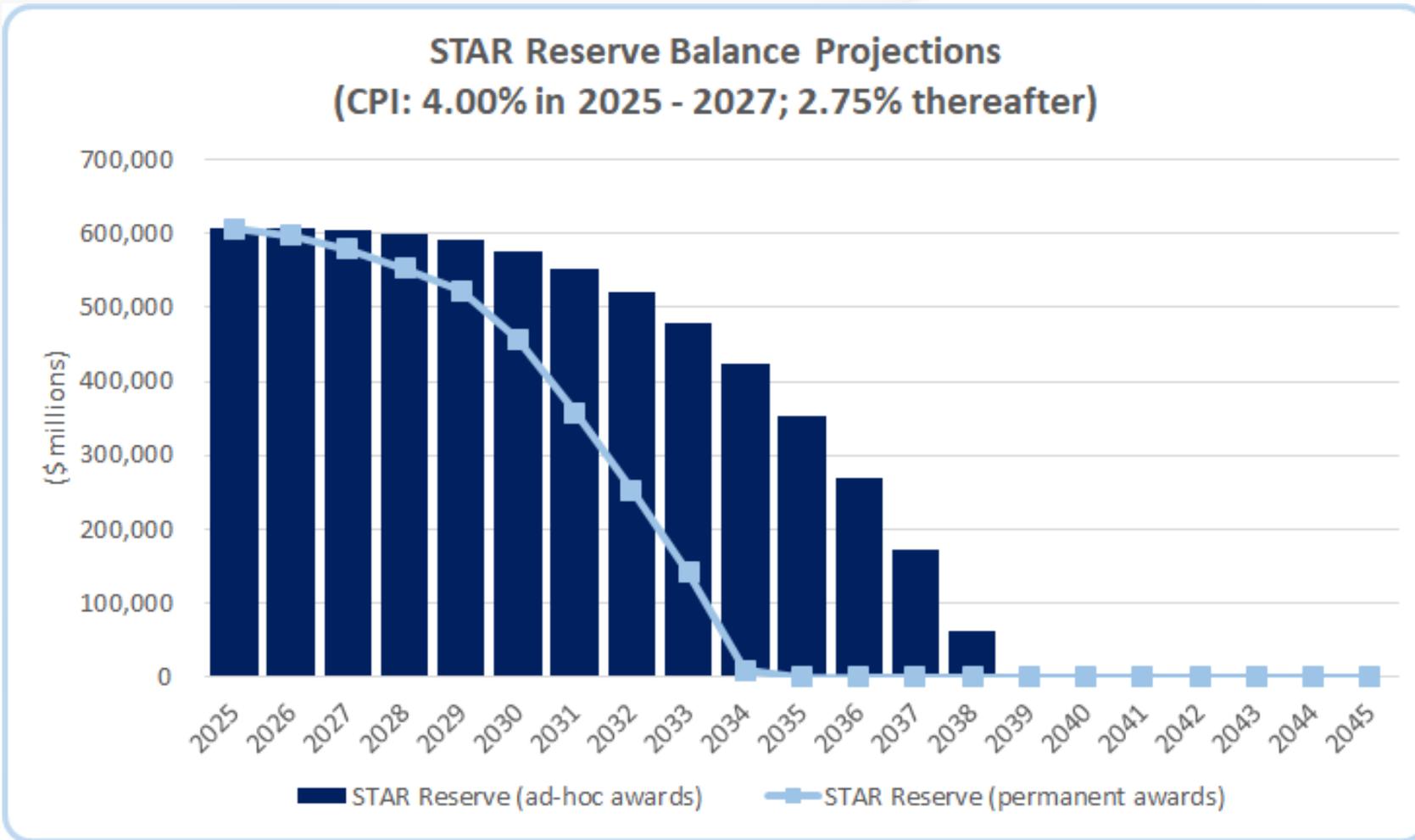
- STAR Reserve depletes in 2040
- STAR payments continue that are already awarded; no new additions

### Annual STAR Benefits

- Similar under both award options through 2040
- At least as good under ad-hoc option through 2043
- Better under permanent option after 2043 for those with pre-2040 permanent awards



## Scenario 2: 2025 – 2027 CPI = 4.00% per year; 2.75% thereafter



### Ad-hoc Payments

- STAR Reserve depletes in 2039
- All STAR benefits stop; no future benefits

### Permanent Transfers

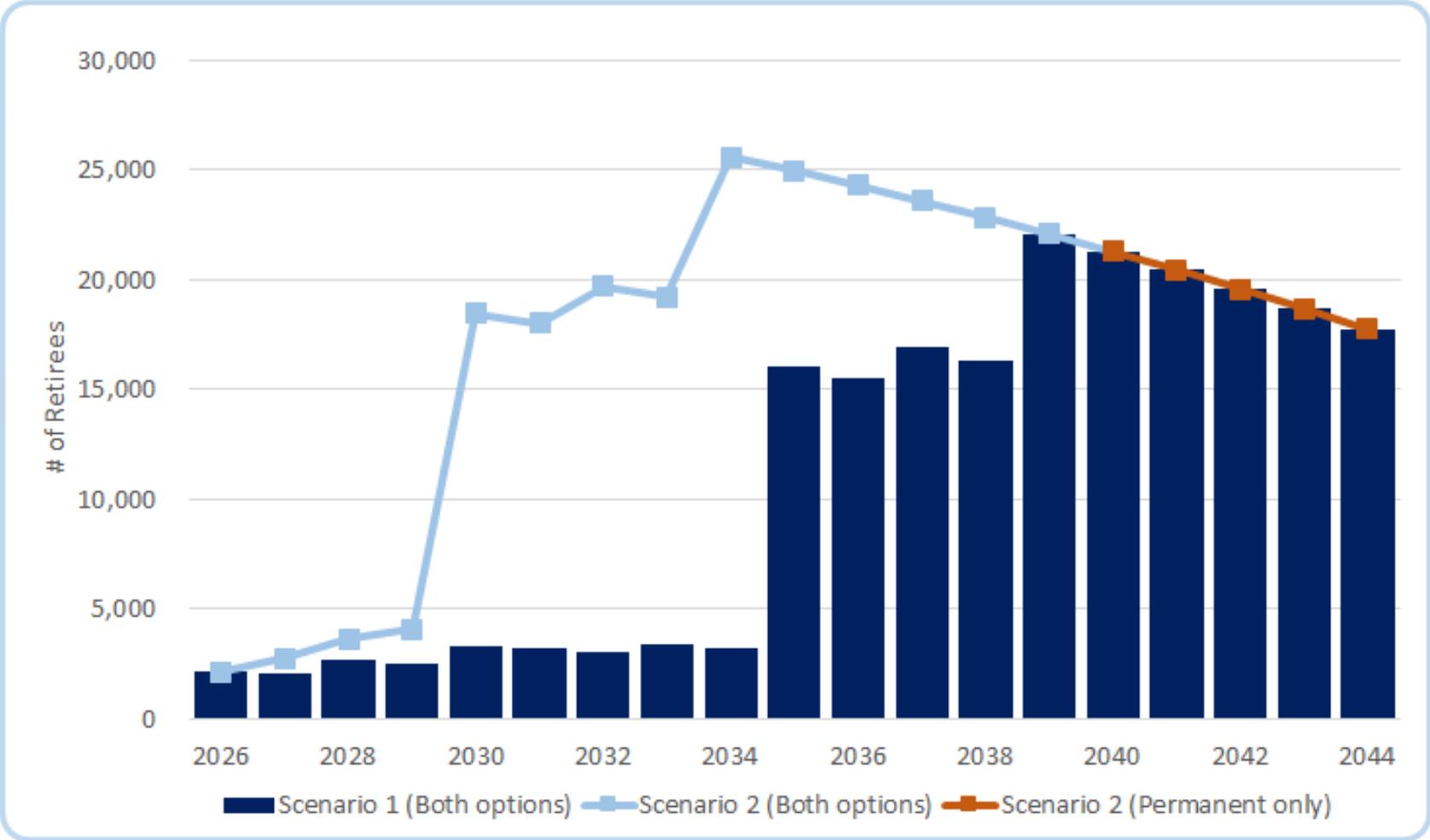
- STAR Reserve depletes in 2035
- STAR payments continue that are already awarded; no new additions

STAR Reserve depletion dates are very sensitive to:

- Actual CPI
- BOR decisions to award ad-hoc or permanent STAR COLA



## Projection of Retirees eligible to receive STAR Benefits under each scenario



### Scenario 1

- ❑ After 2044 only permanent STAR benefits awarded through 2040 are provided
- ❑ All ad-hoc benefits stop at 2044

### Scenario 2

- ❑ Eligible retiree count grows faster due to higher CPI in 2025-2027
- ❑ After 2039 only permanent STAR benefits awarded through 2035 are provided
- ❑ All ad-hoc benefits stop at 2039

# Thank You!



## STAR COLA Overview

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Questions?



# 07 APPENDIX

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Additional Information



# Terminology

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Definitions of Key Terms



## Terminology

### **CERL: County Employees Retirement Law of 1937**

- Established the retirement plan rules and created LACERA on January 1, 1938.

### **PEPRA: Public Employees Pension Reform Act**

- Updated CERL provisions in 2013.
- Created PERPA Plans Safety C and General G.
- Closed Legacy Plans (Safety A and B, General A-D).

### **COLA: Cost-of Living Adjustment<sup>1</sup>**

- Annual statutory COLA based upon Consumer Price Index (CPI) change from prior year.
- Annual COLA award limited by CERL provisions.
- Also called: COLA, Statutory COLA, April 1<sup>st</sup> COLA.

### **STAR COLA: Supplemental Targeted Adjustment for Retirees (STAR) Cost-of-Living Adjustment (COLA) Program<sup>2</sup>**

- Discretionary supplemental COLA awarded by the Board of Retirement based upon loss of purchasing power.
- Amount based on year of retirement and COLA Accumulation Account balance.
- Retirees and beneficiaries eligible except Plan E.
- Also called: STAR, STAR COLA, STAR Program, STAR Benefit.

<sup>1</sup> Per Government Code Sections 31870, 31870.1 and 31495.5.

<sup>2</sup> Per Government Code Sections 31874.3 and 7507.



## Terminology (Continued)

### COLA Accumulation or “COLA Bank”

- Accounts are tracked by retirement plan and retirement date, established at 0%.
- Increases when CPI is higher than Plan maximums
  - Example: CPI = 3.4%, Plan maximum = 2.0%, Addition to Bank = 1.4%.
- Decreases when COLA awards are below Plan maximums
  - Example: CPI = 1.3%, COLA Award = 1.5%, Plan maximum = 2.0%, Deduction from Bank = 0.5%.

### CPI: Consumer Price Index

- A measure that tracks the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services.
- Published monthly by the U.S. Bureau of Labor Statistics (BLS).
- Calendar year changes used to determine LACERA Statutory COLA.

### Purchasing Power

- Amount of goods or services a dollar can purchase upon retirement.
- When a member’s original pension benefit decreases below 80% of its original purchasing power, OR, when the COLA Accumulation account exceeds a 20% balance.
  - COLA Accumulation balance at 21.5%, means the member’s purchasing power is at 78.5% ( $100\% - 21.5\% = 78.5\%$ ), which is below 80%. STAR COLA of 1.5% will restore the purchasing power to an 80% level ( $78.5\% + 1.5\% = 80\%$ ).



## Terminology (Continued)

### STAR Reserve

- Pension reserves are established from member and employer contributions and the accumulation of realized investment income after satisfying investment and administrative expenses.
- STAR Reserve originally funded during the 1990s with excess earnings based on the 1994 Retirement System Funding Agreement established with Los Angeles County.
- Represents the balance available (\$614m) to fund future STAR Program benefits.
- Amounts are deducted to provide funding for STAR Program benefits.

### Consulting Actuary

- Milliman is LACERA's Consulting Actuary who confirms the COLA Accumulation Account balances and calculates the cost of awarding the STAR COLA benefits.

### Legal

- Discretion: Board of Retirement is *not* required to approve STAR COLA benefits, even when the required loss of purchasing power has occurred; the decision is at the discretion of the Board.
- Ad-Hoc Benefit: awarded on a calendar year basis and the Board of Retirement must approve these benefits annually to be paid in future years.
- Permanent Benefit: awarded as part of the members' base retirement allowance and the Board of Retirement is not required to approve that year's benefit in future years.



## Plan Maximums

All retirees and eligible payees may receive the maximum allowable Statutory COLA under their plans:

Retirement Plan	COLA
General Plan A and Safety Plan A	+3.0%
General Plans B, C, D and Safety B	+2.0%
General Plan E Members (retired on and after June 4, 2002)	Up to +2.0%
PEPRA General Plan G and Safety C	+2.0%

**Subject to Board of Retirement approval:** The increase becomes effective April 1<sup>st</sup> and will be reflected in the April 30<sup>th</sup> benefit payment.



# Statutory COLA

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## Overview



## Statutory COLA: Key Concepts

### Process Outline

#### January

1. Review Consumer Price Index (CPI) Change
  - Prior Calendar Year
2. Determine COLA
  - CPI Change compared to plan maximums
3. Update COLA Accumulation (Bank) account balances
  - Periods of high inflation = increase bank
  - Periods of low inflation = decrease bank
  - STAR COLA (permanent) = decrease bank
4. COLA effective April 1<sup>st</sup>

### Cost-of-Living Adjustments

Retirement Payments

By law, LACERA retirement and survivor allowances are subject to an annual cost-of-living adjustment (COLA). The adjustment is driven by changes in the cost of living over the previous 12-month period as of December 31.

Your Paystub

Cost of Living

COLA Accumulation

STAR COLA

Direct Deposit

Tax Requirements

Returning to Work

Divorce

Admin Appeals

#### Current COLA

For the most recent COLA affecting your allowance, see your specific plan page:

General Plans ABC

General Plan D

General Plan E

General Plan G

Safety Plans AB

Safety Plan C

Each year, the Board of Retirement is required to review the Bureau of Labor Statistics Consumer Price Index (CPI) for all urban consumers in the Los Angeles-Long Beach-Anaheim metro area to determine whether there has been an increase or decrease in the cost of living over the prior year. The CPI is based on the price for consumer goods and services, and the year-to-year difference is reflected as a percentage.



Government Code<sup>1</sup> provisions require the Board of Retirement to determine whether there has been an increase or decrease in the cost-of-living as of January 1 each year:

Bureau of Labor Statistics (BLS) Consumer Price Index (CPI):  
>CPI for All Urban Consumers for Los Angeles-Long Beach-Anaheim area

**CPI Percentage Change (Calendar Year 2024)** **3.4%**

**April 1, 2025**

**Statutory Plan Maximum (Plan A)** **3.0%**  
**>COLA Accumulation Increase** **0.4%**

**Statutory Plan Maximum (Plans B, C, & D  
PEPRA Plans C & G)** **2.0%**  
**>COLA Accumulation Increase** **1.4%**

**Statutory Plan Maximum (Plan E)** **2.0%**  
**>COLA Accumulation Increase** **1.4%**

## Notes

### COLA Accumulation account increases:

- Inflation higher than statutory COLA maximums
- COLA Accumulation accounts capture excess inflation amounts that exceed plan maximums
- Accumulation accounts generally increase over time when inflation is higher than plan maximums
- The longer since retirement, potentially, the higher the COLA Accumulation balance

### Monthly CPI Watch email:

- Estimate calendar year-to-date change to anticipate COLA award

<sup>1</sup> Per Government Code Sections 31870, 31870.1 and 31495.5.



# ACCUMULATION ACCOUNTS

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By Retirement Plan and Date



## COLA and STAR COLA Cycle (COLA and STAR COLA are interlinked)

### April 2024 COLA

- Review annual change in CPI
- Above plan maximum = Add to COLA Bank
- Below plan maximum = Deduct from COLA Bank
- Update COLA Bank balances

### January 2025 STAR COLA

- Review COLA Bank balances
- Above 20% = Eligible for STAR COLA
- Below 20% = Not Eligible for STAR COLA
- STAR COLA award (permanent) = Reduce COLA Bank to 20%

### April 2025 COLA

- [Cycle Repeats]
- Annual CPI determines changes in COLA bank
  - COLA Bank balance may increase or decrease

### January 2026 STAR COLA

- [Cycle Repeats]
- COLA Bank balance determines eligibility
  - Calculate cost
  - Obtain BOR approval
  - Discretionary benefit
  - Ad-hoc: one year
  - Permanent: lifetime



## COLA Accumulation Sample

(Accumulation Account Changes for COLA & STAR COLA)  
2024 to 2025

Retirement Date	Plan	2024 CPI Change	2025 Statutory COLA <sup>1</sup>	Bank Balance April 2024	STAR COLA <sup>2</sup> January 2025	COLA Bank Adjustment <sup>3</sup> April 2025	Bank Balance April 2025
4/1/77 – 3/31/91	B,C,D	3.4%	2.0%	21.5%	-1.5%	+1.4%	21.4%

- 1 Statutory COLA is equal to CPI Change (prior calendar year), limited to the plan-maximum COLA (2% for plans B,C,D). If the prior year CPI is less than the plan-maximum, the Statutory COLA may be “topped-up” if there is available Accumulation Account Balance. The Accumulation Account is adjusted to reflect the “top-up” (see #3).
- 2 Permanent STAR COLA restores purchasing power for eligible retirees. A permanent STAR COLA is added to the retirement allowance and reduces the Accumulation Account by the same amount.
- 3 The COLA Bank Adjustment is the difference between the CPI Change and the Statutory COLA award.



## COLA Accumulation Hypothetical CPI Examples (Accumulation Account Changes for COLA & Permanent STAR COLA) 2025 to 2026

Retirement Date	Plan	2025 CPI Change	2026 Statutory COLA <sup>1</sup>	Bank Balance April 2025	STAR COLA <sup>2</sup> January 2026	COLA Bank Adjustment <sup>3</sup> April 2026	Bank Balance April 2026
4/1/77 – 3/31/91	B,C,D	0.5%	2.0%	21.4%	-1.4%	-1.5%	18.5%
4/1/77 – 3/31/91	B,C,D	4.5%	2.0%	21.4%	-1.4%	+2.5%	22.5%

- 1 Statutory COLA is equal to CPI Change (prior calendar year), limited to the plan-maximum COLA (2% for plans B,C,D). If the prior year CPI is less than the plan-maximum, the Statutory COLA may be “topped-up” if there is available Accumulation Account Balance. The Accumulation Account is adjusted to reflect the “top-up” (see #3).
- 2 Assumed permanent STAR COLA restores purchasing power for eligible retirees. A permanent STAR COLA is added to the retirement allowance and reduces the Accumulation Account by the same amount.
- 3 The COLA Bank Adjustment is the difference between the CPI Change and the Statutory COLA award.



## COLA Accumulation Hypothetical CPI Examples (Accumulation Account Changes for COLA & Permanent STAR COLA) 2026 to 2027

Retirement Date	Plan	2026 CPI Change	2027 Statutory COLA <sup>1</sup>	Bank Balance April 2026	STAR COLA <sup>2</sup> January 2027	COLA Bank Adjustment <sup>3</sup> April 2027	Bank Balance April 2027
4/1/77 – 3/31/91	B,C,D	4.5%	2.0%	18.5%	N/A	+2.5%	21.0%
4/1/77 – 3/31/91	B,C,D	0.5%	2.0%	22.5%	-2.5%	-1.5%	18.5%

- 1 Statutory COLA is equal to CPI Change (prior calendar year), limited to the plan-maximum COLA (2% for plans B,C,D). If the prior year CPI is less than the plan-maximum, the Statutory COLA may be “topped-up” if there is available Accumulation Account Balance. The Accumulation Account is adjusted to reflect the “top-up” (see #3).
- 2 Assumed permanent STAR COLA restores purchasing power for eligible retirees. A permanent STAR COLA is added to the retirement allowance and reduces the Accumulation Account by the same amount.
- 3 The COLA Bank Adjustment is the difference between the CPI Change and the Statutory COLA award.



## COLA Accumulation Chart (4/1/77 to 3/31/2002)

Retirement Date	General Plan A and Safety Plan A				General Plans B, C & D, and Safety Plans B & C			
	COLA % Accumulation 1-Apr-24	STAR Benefit Adjustment in 2025	COL Adjustment 1-Apr-25	COLA % Accumulation 1-Apr-25	COLA % Accumulation 1-Apr-24	STAR Benefit Adjustment in 2025	COL Adjustment 1-Apr-25	COLA % Accumulation 1-Apr-25
Before 4/1/77	11.3	-	0.4	11.7	-	-	-	-
4/1/1977 - 3/31/1978	11.3	0.0	0.4	11.7	21.5	(1.5)	1.4	21.4
4/1/1978 - 3/31/1979	11.3	0.0	0.4	11.7	21.5	(1.5)	1.4	21.4
4/1/1979 - 3/31/1980	11.3	0.0	0.4	11.7	21.5	(1.5)	1.4	21.4
4/1/1980 - 3/31/1981	11.3	0.0	0.4	11.7	21.5	(1.5)	1.4	21.4
4/1/1981 - 3/31/1982	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1982 - 3/31/1983	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1983 - 3/31/1984	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1984 - 3/31/1985	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1985 - 3/31/1986	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1986 - 3/31/1987	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1987 - 3/31/1988	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1988 - 3/31/1989	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1989 - 3/31/1990	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1990 - 3/31/1991	6.0	0.0	0.4	6.4	21.5	(1.5)	1.4	21.4
4/1/1991 - 3/31/1992	6.0	0.0	0.4	6.4	20.3	(0.3)	1.4	21.4
4/1/1992 - 3/31/1993	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1993 - 3/31/1994	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1994 - 3/31/1995	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1995 - 3/31/1996	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1996 - 3/31/1997	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1997 - 3/31/1998	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1998 - 3/31/1999	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/1999 - 3/31/2000	6.0	0.0	0.4	6.4	19.7	0.0	1.4	21.1
4/1/2000 - 3/31/2001	6.0	0.0	0.4	6.4	19.4	0.0	1.4	20.8
4/1/2001 - 3/31/2002	6.0	0.0	0.4	6.4	17.7	0.0	1.4	19.1

Accumulation balance is based upon:  
 >Plan  
 >Retirement date



## COLA Accumulation Chart (4/1/2002 to 3/31/2025)

Retirement Date	General Plan A and Safety Plan A				General Plans B, C & D, and Safety Plans B & C			
	COLA % Accumulation 1-Apr-24	STAR Benefit Adjustment in 2025	COL Adjustment 1-Apr-25	COLA % Accumulation 1-Apr-25	COLA % Accumulation 1-Apr-24	STAR Benefit Adjustment in 2025	COL Adjustment 1-Apr-25	COLA % Accumulation 1-Apr-25
4/1/2002 - 3/31/2003	6.0	0.0	0.4	<b>6.4</b>	17.6	0.0	1.4	<b>19.0</b>
4/1/2003 - 3/31/2004	6.0	0.0	0.4	<b>6.4</b>	15.9	0.0	1.4	<b>17.3</b>
4/1/2004 - 3/31/2005	6.0	0.0	0.4	<b>6.4</b>	15.9	0.0	1.4	<b>17.3</b>
4/1/2005 - 3/31/2006	6.0	0.0	0.4	<b>6.4</b>	13.5	0.0	1.4	<b>14.9</b>
4/1/2006 - 3/31/2007	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2007 - 3/31/2008	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2008 - 3/31/2009	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2009 - 3/31/2010	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2010 - 3/31/2011	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2011 - 3/31/2012	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2012 - 3/31/2013	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2013 - 3/31/2014	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2014 - 3/31/2015	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2015 - 3/31/2016	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2016 - 3/31/2017	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2017 - 3/31/2018	6.0	0.0	0.4	<b>6.4</b>	12.3	0.0	1.4	<b>13.7</b>
4/1/2018 - 3/31/2019	6.0	0.0	0.4	<b>6.4</b>	10.7	0.0	1.4	<b>12.1</b>
4/1/2019 - 3/31/2020	6.0	0.0	0.4	<b>6.4</b>	9.5	0.0	1.4	<b>10.9</b>
4/1/2020 - 3/31/2021	6.0	0.0	0.4	<b>6.4</b>	9.0	0.0	1.4	<b>10.4</b>
4/1/2021 - 3/31/2022	6.0	0.0	0.4	<b>6.4</b>	9.0	0.0	1.4	<b>10.4</b>
4/1/2022 - 3/31/2023	2.4	0.0	0.4	<b>2.8</b>	4.4	0.0	1.4	<b>5.8</b>
4/1/2023 - 3/31/2024	0.5	0.0	0.4	<b>0.9</b>	1.5	0.0	1.4	<b>2.9</b>
4/1/2024 - 3/31/2025	0.0	0.0	0.4	<b>0.4</b>	0.0	0.0	1.4	<b>1.4</b>



## COLA Accumulation Chart

(all retirement dates)

Retirement Date			[PEPRA] General Plan G and Safety Plan C			
			COLA % Accumulation 1-Apr-24	STAR Benefit Adjustment in 2025	COL Adjustment 1-Apr-25	COLA % Accumulation 1-Apr-25
1/1/2013	-	3/31/2013	12.3	0.0	1.4	<b>13.7</b>
4/1/2013	-	3/31/2014	12.3	0.0	1.4	<b>13.7</b>
4/1/2014	-	3/31/2015	12.3	0.0	1.4	<b>13.7</b>
4/1/2015	-	3/31/2016	12.3	0.0	1.4	<b>13.7</b>
4/1/2016	-	3/31/2017	12.3	0.0	1.4	<b>13.7</b>
4/1/2017	-	3/31/2018	12.3	0.0	1.4	<b>13.7</b>
4/1/2018	-	3/31/2019	10.7	0.0	1.4	<b>12.1</b>
4/1/2019	-	3/31/2020	9.5	0.0	1.4	<b>10.9</b>
4/1/2020	-	3/31/2021	9.0	0.0	1.4	<b>10.4</b>
4/1/2021	-	3/31/2022	9.0	0.0	1.4	<b>10.4</b>
4/1/2022	-	3/31/2023	4.4	0.0	1.4	<b>5.8</b>
4/1/2023	-	3/31/2024	1.5	0.0	1.4	<b>2.9</b>
4/1/2024	-	3/31/2025	0.0	0.0	1.4	<b>1.4</b>

Note: PEPRA Plans G and C became effective January 1, 2013.



## COLA Accumulation Chart

(all eligible retirement dates)

Retirement Date			General Plan E		
			COLA % Accumulation 01-Apr-24	COL Adjustment 01-Apr-25	COLA % Accumulation 01-Apr-25
4/1/2002	-	3/31/2003	17.6	1.4	19.0
4/1/2003	-	3/31/2004	15.9	1.4	17.3
4/1/2004	-	3/31/2005	15.9	1.4	17.3
4/1/2005	-	3/31/2006	13.5	1.4	14.9
4/1/2006	-	3/31/2007	12.3	1.4	13.7
4/1/2007	-	3/31/2008	12.3	1.4	13.7
4/1/2008	-	3/31/2009	12.3	1.4	13.7
4/1/2009	-	3/31/2010	12.3	1.4	13.7
4/1/2010	-	3/31/2011	12.3	1.4	13.7
4/1/2011	-	3/31/2012	12.3	1.4	13.7
4/1/2012	-	3/31/2013	12.3	1.4	13.7
4/1/2013	-	3/31/2014	12.3	1.4	13.7
4/1/2014	-	3/31/2015	12.3	1.4	13.7
4/1/2015	-	3/31/2016	12.3	1.4	13.7
4/1/2016	-	3/31/2017	12.3	1.4	13.7
4/1/2017	-	3/31/2018	12.3	1.4	13.7
4/1/2018	-	3/31/2019	10.7	1.4	12.1
4/1/2019	-	3/31/2020	9.5	1.4	10.9
4/1/2020	-	3/31/2021	9.0	1.4	10.4
4/1/2021	-	3/31/2022	9.0	1.4	10.4
4/1/2022	-	3/31/2023	4.4	1.4	5.8
4/1/2023	-	3/31/2024	1.5	1.4	2.9
4/1/2024	-	3/31/2025	0.0	1.4	1.4

Plan E members:  
Eligible for COLA but not STAR COLA

Note: Plan E COLA benefit is effective for members who retire on and after June 4, 2002.



# Funding

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COLA / STAR COLA

## Statutory COLA Funding

### Employer and Employee Reserve Impact

#### COST

- **Paid from Employer and Employee Reserves (same as retirement benefit payments):**
  - **Employer and Employee contribution rates include funding for retiree COLA**

#### VALUATION ASSETS

- **Employer and Employee Reserves:**
  - **Balances included in valuation assets**
  - **Balances reduced when retirement benefits are paid**

#### VALUATION LIABILITIES

- **Annual COLA Awards:**
  - **Included in valuation liabilities**
  - **Pre-funded through contributions**

General Members  
Plan D Center

Plan D Center

Basic Provisions

▶ **Contribution Rates**

Compensation Limits

Current COLA

Pension Reform

Transfers to Plan E

Deferred Membership

Disability Retirement

Social Security and Medicare



Your Plan Book Online

### Contribution Rates

LACERA's retirement fund relies on three sources of funding: investment earnings, employer contributions, and employee (member) contributions. Your contribution rate for General Plan D (a legacy plan) is a percentage of your [compensation earnable](#), based on your entry age into LACERA.

As a legacy plan, General Plan D member contribution rates are generally updated when certain actuarial assumptions change, as determined in a study called an investigation of experience, conducted every three years.

Log in to [My LACERA](#) any time to see your current contribution rate.

Adjustments are based on changes to actuarial assumptions, and rates are calculated by LACERA's actuary based on retirement law. The law requires the member to pay a portion of the cost of their retirement benefits and also requires that the cost-of-living benefit amount be shared equally between the member and the employer. (Employer rates are updated annually based on fund evaluations.) Read more about [how contributions rates are set](#).



## STAR COLA Funding

### Excess Earnings

- 1994 County issued Pension Obligation Bonds
- LACERA's funded ratio exceeded 100% in subsequent years
- 1994 Retirement System Funding Policy required the Board of Investments to allocate all excess earnings:
  - 75% to Employer Reserves (County Contribution Credit Reserve)
  - 25% to STAR Reserve

### STAR Reserve

- Highest balance in 1999 due to excess earnings contributions: \$1.023 billion
- STAR benefits paid from STAR Reserve for the 1990-2009 and 2023-2025 Program Years
- Balance as of June 30, 2025: \$607.0 million

### 2025 STAR COLA Awards

- Ad-Hoc STAR Program cost: \$0.2 million
- Permanent STAR Program cost: \$1.6 million

**FOR INFORMATION ONLY**

June 20, 2025

**TO:** Each Trustee  
Board of Retirement**FROM:** Luis Lugo *LL*  
Deputy Chief Executive Officer, LACERA**FOR:** Board of Retirement Meeting July 10, 2025**SUBJECT: Report on Retired Annuitants Employed Under 960 Hour Requests for FY 2024-2025****BACKGROUND**

This memorandum provides the Board of Retirement with the annual report on all retired annuitants employed under 960 Hour Requests, as required by LACERA's Post-Retirement Employment Policy Section 6.4.4: *Monitoring*.

Section 6.4.4 provides that:

*"the Executive Office shall ensure that the Board of Retirement is provided with an annual report at the end of each fiscal year of all retired annuitants working under 960 Hour Requests, including the name, the number of fiscal years of post-retirement employment with LACERA, summary of limited duration work performed, estimated completion date, status of transition plan, status of any emergency or critical need that the retired annuitant was rehired to address, and the history of hours performed in each fiscal year of employment."*

**RETIRED ANNUITANTS**

*Annuitant Jan Tran Willet*

<b>Name</b>	<b>Division</b>	<b>Years of Post - Retirement Employment</b>	<b>Hours Worked Per Fiscal Year</b>	<b>Estimated Completion Date</b>
Jan Tran Willet	Systems	FY 24/25	849 <sup>1</sup>	June 30, 2025
		FY 23/24	864	
		FY 22/23	902	
		FY 21/22	937.33	
		FY 20/21	1019	

<sup>1</sup> Hours worked as of May 30, 2025.

		FY 19/20	333	
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Summary of Limited Duration Work:

Ms. Tran Willet played a pivotal role in the successful implementation of key enhancements to our mainframe application system. She was instrumental in gathering and analyzing complex business requirements, including those related to the PEPR Final Average Compensation (FAC) provisions.

In addition to her analytical contributions, Ms. Tran Willet identified the root cause of system defects and served as the subject matter expert throughout the planning of the mainframe migration initiative. Her deep expertise was essential in guiding both project management and technical leadership teams in identifying and prioritizing business functions for migration, based on their operational criticality.

Her leadership and technical insight significantly advanced the project’s progress and ensured alignment with strategic business initiatives.

Status of Transition Plan:

The transition is in progress. Ms. Tran Willet meets regularly with the Pension Administration System analysts to transfer knowledge, best practices, and important insights for business-critical functions, with an expected completion date of June 30, 2025.

Status of any emergency or critical need that the retired annuitant was rehired to address:

Ms. Tran Willet was re-engaged to support the completion of critical changes to the mainframe application, a project that has since been successfully concluded. In addition, she provided key support for the implementation of all associated mainframe business process modifications.

These changes were strategically prioritized based on their operational criticality and were deployed to production following comprehensive testing and validation procedures. Her contributions ensured a smooth transition and reinforced the integrity of post-deployment operations. Ms. Tran Willet’s assignment will end on June 30, 2025.

*Annuitant Margo McCabe*

Name	Division	Years of Post -Retirement Employment	Hours Worked Per Fiscal Year	Estimated Completion Date
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Margo McCabe	Legal	FY 24/25	399.5 <sup>2</sup>	June 30, 2026
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Summary of Limited Duration Work:

Ms. McCabe, in her role as a Legal Analyst, supported investment-related transactions. Her responsibilities included handling country filings for the Equities program and collaborating with LACERA's custodian, State Street Bank; preparing tax exemption applications; assisting with real estate dispositions by preparing minutes and consents; and organizing unclaimed property documentation. This support is essential for the Legal Division's efforts to support the Investment Office.

The Legal Division has six budgeted Legal Analyst positions, with three assigned to the Investments Unit. Two of the positions are vacant and the current Legal Analyst is working overtime daily to manage the workload. Though full-time analysts are needed, Ms. McCabe provides 13 hours of support per week, which is crucial for timely task completion. Ms. McCabe was highly skilled at these duties during her 13-year tenure at LACERA before retiring in 2023.

Status of Transition Plan:

The transition plan includes the hiring of two permanent Legal Analysts as allocated in the budget for the Legal Division's Investment Unit. LACERA posted an open and competitive examination in 2024. Despite extensive advertising and candidate outreach, the recruitment process was unsuccessful. As a result, the recruitment was cancelled and scheduled to be reposted in 2025.

Given that investments is a specialized field for Legal Analysts, it is challenging to find candidates with an investment background.

Status of any emergency or critical need that the retired annuitant was rehired to address:

The critical need is to support necessary investment legal work despite the current vacancies. The amount of work is so great that it cannot be fully performed by the one current permanent Legal Analyst. It is important that LACERA take advantage of Ms. McCabe's availability as a rehired retiree to perform this work on a limited basis.

The Legal Division will be requesting Ms. McCabe return as a rehired annuitant for a second year. Because the request is for only a second year, approval may be made by the Executive Office under the Post Retirement Employment Policy and does not require Board action.

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<sup>2</sup> Hours worked as of May 30, 2025.

**FOR INFORMATION ONLY**

June 24, 2025

**TO:** Each Trustee  
Board of Retirement

**FROM:** Ricki Contreras   
Administrative Services Division Manager

Elsy Gutierrez   
Supervising Administrative Assistant II

**FOR:** July 10, 2025, Board of Retirement Meeting

**SUBJECT: Contracting Activity Report – May 2025**

The Board of Retirement (BOR) adopted the [Policy for the Procurement of Goods and Services \(PGS\)](#) on September 4, 2024. The PGS requires the Vendor Management Group to provide the BOR a monthly report on all contracting activity. Below is a summary of the contracting activity for the month of May 2025.

Category	Total	Approximate Dollar Amount
New Contracts	3	\$106,660.00
Renewals	11	\$215,891.00
Amendment	1	\$107,100.00
<b>Total</b>	<b>15</b>	<b>\$429,651.00</b>

Attachment

EG: eg

- C: Santos H. Kreimann, Chief Executive Officer
- Luis Lugo, Deputy Chief Executive Officer
- JJ Popowich, Assistant Executive Officer
- Jon Grabel, Chief Investments Officer
- Steven P. Rice, Chief Counsel
- Richard Bendall, Chief Internal Audit
- Carly Ntoya, Director of Human Resources

**Summary of Contracting Activity: May 2025**

Vendor	Division	Type	Term (Months)	New/Renewals	Total Contract Value
Code 3 Life Inc.	Human Resources	Training Agreement	12	N	\$15,500.00
WBCP, Inc. (SOW 5)	Human Resources	Recruitment Services	12	N	\$21,300.00
Eccentex Corporation	Systems	Consulting Services	3	N	\$69,860.00
Finalcover, LLC	Disability Retirement Services	Software Agreement	12	R	\$22,128.00
Workiva Inc.	Financial and Accounting Services	Software Agreement	12	R	\$76,108.00
General Networks Corporation	Systems	Maintenance and Support	12	R	\$4,985.00
General Networks Corporation	Systems	Software Agreement	12	R	\$4,100.00
Nth Generation Computing, Inc.*	Systems	Maintenance and Support	12	R	\$38,317.00
Pluralsight, LLC	Systems	Software Agreement	12	R	\$3,474.00
Postman Inc. *	Systems	Software Agreement	12	R	\$11,172.00
Rocket Software, Inc.	Systems	Software Agreement	12	R	\$3,808.00
SHI International (Secure W-2)	Systems	Software Agreement	12	R	\$34,260.00
American Registry For Internet Numbers Ltd.	Systems	Software Agreement	12	R	\$262.00
Accusoft Snowbound Software*	Systems	Maintenance and Support	12	R	\$17,277.00
<b>Total</b>					<b>\$322,551.00</b>

Vendor	Division	Type	Term (Months)	Amendment/Extension	Total Contract Value
	GoTo Technologies LLC.	Software Agreement	36	A	\$107,100.00
<b>Total</b>					<b>\$107,100.00</b>

\*Sole Source Procurements

\*\* Contract executed by Business Owner

**FOR INFORMATION ONLY**

June 27, 2025

TO: Each Trustee  
Board of Retirement  
Board of Investments

FROM: Ted Granger *TG*  
Chief Financial Officer

FOR: July 10, 2025 Board of Retirement Meeting  
August 13, 2025 Board of Investments Meeting

**SUBJECT: MONTHLY TRUSTEE TRAVEL & EDUCATION REPORT – MAY 2025**

Attached for your review is the monthly Trustee Travel & Education Report. This report includes all events (i.e., attended and canceled) from the beginning of the fiscal year through May 2025.

Trustees attend monthly Board and Committee meetings at LACERA's office which are considered administrative meetings per the Trustee Travel Policy. In order to streamline report volume and information, these regular meetings are excluded from the monthly travel reports but are included in the quarterly travel expenditure reports.

Staff travel and education expenditure reports are provided to the Chief Executive Officer monthly and to the Boards quarterly.

REVIEWED AND APPROVED:

\_\_\_\_\_  
Luis A. Lugo  
Deputy Chief Executive Officer

TG/JT/EW/SC/SE/gj

**Attachments**

c: J. Popowich  
L. Guglielmo  
J. Grabel  
S. Rice  
R. Contreras

**TRUSTEE TRAVEL AND EDUCATION REPORT**  
**FOR FISCAL YEAR 2024 - 2025**  
**MAY 2025**

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
<b>Nancy Durazo</b>			
A	1 Edu - 2024 Wharton Investment Strategies and Portfolio Management - Philadelphia PA	10/14/2024 - 10/18/2024	Attended
V	- Edu - Southern New Hampshire University: Principles of Finance & Public Fiscal Management (Weekly Course) - VIRTUAL	07/01/2024 - 08/25/2024	Attended
	- Edu - Southern New Hampshire University: Policy Analysis and the Role of the Public (Weekly Course) - VIRTUAL	09/02/2024 - 10/27/2024	Attended
	- Edu - Southern New Hampshire University: Program Accountability and Driving Business Opportunities (Weekly Course) - VIRTUAL	10/28/2024 - 12/22/2024	Attended
	- Edu - National University: Public Personnel Policy (Weekly Course) - VIRTUAL	02/03/2025 - 02/24/2025	Attended
	- Edu - Foundations of Public Administration (Weekly Course) - VIRTUAL	04/07/2025 - 05/02/2025	Attended
<b>Trevor Fay (term ended 12/31/2024)</b>			
A	1 Edu - Infrastructure Investor: North America Forum - New York City NY	12/04/2024 - 12/05/2024	Attended
B	- Edu - Toigo Foundation 35th Anniversary Gala - Los Angeles CA	11/20/2024 - 11/20/2024	Attended
<b>Mike Gatto</b>			
A	1 Edu - 2024 SACRS UC Berkeley Public Pension Investment Management Program - Berkeley CA	07/14/2024 - 07/17/2024	Attended
B	- Edu - 2024 The Investment Diversity Exchange (TIDE) Spark - Laguna Niguel CA	07/10/2024 - 07/11/2024	Attended
	- Edu - IFEBP Annual Employee Benefits Conference - San Diego CA	11/10/2024 - 11/13/2024	Attended
	- Edu - SACRS Spring Conference - Rancho Mirage CA	05/13/2025 - 05/16/2025	Attended
<b>Elizabeth Ginsberg</b>			
A	1 Edu - 2024 Wharton Investment Strategies and Portfolio Management - Philadelphia PA	10/14/2024 - 10/18/2024	Attended
B	- Edu - Pathways for Women Conference 2024 - Anaheim CA	08/26/2024 - 08/27/2024	Attended
	- Edu - IFEBP New Trustees Institute - Level I: Core Concepts - San Diego CA	11/09/2024 - 11/11/2024	Attended
<b>Vivian Gray (term ended 12/31/2024)</b>			
A	1 Edu - 2024 Koried Global Summit: What Matters Now in 2024: Trends and Insights for Tomorrow - Coral Gables FL	07/17/2024 - 07/19/2024	Attended
	2 Edu - CII 2024 Fall Conference - Brooklyn NY	09/09/2024 - 09/11/2024	Attended
	3 Edu - New America Alliance International Symposium - Mexico City Mexico	09/25/2024 - 09/26/2024	Attended
	4 Edu - PRI in Person 2024 - Toronto, Canada	10/08/2024 - 10/10/2024	Attended
B	- Admin - SACRS Board of Directors - Sacramento CA	09/16/2024 - 09/16/2024	Attended
	- Edu - CALAPRS Intermediate Course in Retirement Plan Administration - San Jose CA	11/06/2024 - 11/08/2024	Attended
	- Edu - SACRS Fall Conference 2024 - Monterey CA	11/12/2024 - 11/15/2024	Attended
	- Admin - 28th Annual NASP Symposium - Queens NY	11/20/2024 - 11/21/2024	Attended

**TRUSTEE TRAVEL AND EDUCATION REPORT**  
**FOR FISCAL YEAR 2024 - 2025**  
**MAY 2025**

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
<b>Jason Green</b>			
A	1 Edu - NCPERS Legislative Conference & Policy Day - Washington, DC	01/27/2025 - 01/29/2025	Attended
V	- Edu - NCPERS 2024 Webinar - State and Federal Legislative Outlook for Public Pensions - VIRTUAL	12/05/2024 - 12/05/2024	Attended
<b>Patrick Jones</b>			
A	1 Edu - NACD Directors Summit 2024 - Washington, DC	10/06/2024 - 10/09/2024	Attended
	2 Edu - Goldman Sachs the Garland Summit: Enduring Legacy - New York City NY	10/09/2024 - 10/10/2024	Attended
	3 Edu - Infrastructure Investor: North America Forum - New York City NY	12/04/2024 - 12/05/2024	Attended
	4 Edu - PPI 2025 Winter Roundtable - Seattle WA	03/05/2025 - 03/07/2025	Attended
	5 Edu - Harvard Kennedy School Executive Education - Infrastructure Financing, Regulation, and Management - Boston MA	05/04/2025 - 05/09/2025	Attended
	6 Edu - FIS Harvard 2025 - Boston MA	05/19/2025 - 05/21/2025	Attended
B	- Edu - 2024 The Investment Diversity Exchange (TIDE) Spark - Laguna Niguel CA	07/10/2024 - 07/11/2024	Attended
	- Edu - NACD PSW Corporate Directors Symposium - Los Angeles CA	11/15/2024 - 11/15/2024	Attended
	- Edu - ALTSLA 2025 - Los Angeles CA	03/17/2025 - 03/19/2025	Attended
	- Edu - 2025 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/19/2025 - 03/20/2025	Attended
V	- Edu - NACD Workforce Challenges and Future Strategy - Why Directors Should Be Engaged - VIRTUAL	11/04/2024 - 11/04/2024	Attended
	- Edu - NACD - Planning for a Transaction: Compensation and Leadership Considerations - VIRTUAL	04/22/2025 - 04/22/2025	Attended
	- Edu - NACD - Elevate Your Personal Brand and Unlock New Board Opportunities - VIRTUAL	04/29/2025 - 04/29/2025	Attended
X	- Edu - IDAC 2024 Annual Summit - Broomfield CO	09/24/2024 - 09/26/2024	Canceled
	- Edu - Catalyst: California's Emerging & Diverse Investment Manager Forum - Sacramento CA	05/12/2025 - 05/13/2025	Canceled
<b>Shawn Kehoe</b>			
B	- Admin - Professional Peace Officers Association (PPOA) Board Offsite - Carlsbad CA	01/25/2025 - 01/25/2025	Attended

**TRUSTEE TRAVEL AND EDUCATION REPORT**  
**FOR FISCAL YEAR 2024 - 2025**  
**MAY 2025**

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
<b>Aleen Langton</b>			
A	1 Edu - NCPERS 2025 Pension Communication Summit - Washington, DC	01/26/2025 - 01/27/2025	Attended
	2 Edu - 2025 Wharton Investment Strategies and Portfolio Management - Philadelphia PA	05/19/2025 - 05/23/2025	Attended
B	- Edu - NCPERS Accredited Fiduciary Program Modules 1 & 2: Governance & Finance - Palm Springs CA	10/26/2024 - 10/27/2024	Attended
	- Edu - 2025 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/19/2025 - 03/20/2025	Attended
C	- Edu - NCPERS Legislative Conference & Policy Day - Washington, DC	01/27/2025 - 01/29/2025	Attended
V	- Edu - NCPERS 2024 Webinar - State and Federal Legislative Outlook for Public Pensions - VIRTUAL	12/05/2024 - 12/05/2024	Attended
	- Edu - TLF Virtual Discussion for Pension Trustees - VIRTUAL	12/05/2024 - 12/05/2024	Attended
	- Edu - Understanding Buffett's \$80B Apple Windfall: Inside the Greatest Value Investment of Our Time - VIRTUAL	12/16/2024 - 12/16/2024	Attended
	- Edu - CALAPRS Trustee Round Table - VIRTUAL	05/30/2025 - 05/30/2025	Attended
<b>Debbie Martin</b>			
A	1 Edu - Harvard Business School Executive Education Program: Audit Committees in a New Era of Governance - Boston MA	07/17/2024 - 07/19/2024	Attended
X	- Edu - 2025 Wharton Investment Strategies and Portfolio Management - Philadelphia PA	05/19/2025 - 05/23/2025	Canceled
<b>Nicole Mi</b>			
A	1 Edu - Harvard Business School Executive Education Program: Audit Committees in a New Era of Governance - Boston MA	07/17/2024 - 07/19/2024	Attended
	2 Edu - New America Alliance International Symposium - Mexico City Mexico	09/25/2024 - 09/26/2024	Attended
	3 Edu - 2024 PPI Executive Seminar and Asia Roundtable - Hong Kong	10/20/2024 - 10/25/2024	Attended
	4 Edu - CII NYU Corporate Governance Bootcamp - New York City NY	11/14/2024 - 11/15/2024	Attended
	5 Edu - PPI 2025 Winter Roundtable - Seattle WA	03/05/2025 - 03/07/2025	Attended
B	- Edu - 2024 The Investment Diversity Exchange (TIDE) Spark - Laguna Niguel CA	07/10/2024 - 07/11/2024	Attended
	- Edu - Pathways for Women Conference 2024 - Anaheim CA	08/26/2024 - 08/27/2024	Attended
	- Edu - Saxena White Women's Alliance Luncheon - Los Angeles CA	09/30/2024 - 09/30/2024	Attended
	- Edu - WIIN 10th Anniversary Event - Los Angeles CA	10/02/2024 - 10/02/2024	Attended
	- Edu - AAAIM Elevate 2024 - Los Angeles CA	10/08/2024 - 10/08/2024	Attended
	- Edu - 2025 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/19/2025 - 03/20/2025	Attended
	- Edu - AAAIM Network of Women - Los Angeles CA	03/27/2025 - 03/27/2025	Attended
	- Edu - AAAIM Venture Capital Summit 2025 - San Francisco CA	04/17/2025 - 04/17/2025	Attended
	- Admin - Prioritize Your Health at the Staying Healthy Together Workshop - Los Angeles CA	04/29/2025 - 04/29/2025	Attended
	- Edu - PPI Salon - Los Angeles CA	05/06/2025 - 05/06/2025	Attended

**TRUSTEE TRAVEL AND EDUCATION REPORT  
FOR FISCAL YEAR 2024 - 2025  
MAY 2025**

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
<b>Nicole Mi</b>			
B	- Edu - SACRS Spring Conference - Rancho Mirage CA	05/13/2025 - 05/16/2025	Attended
V	- Edu - NACD Post Election Federal Policy Outlook for Directors - VIRTUAL	02/05/2025 - 02/05/2025	Attended
	- Edu - NACD - Bridging the Gap: Lessons Public and Private Boards Can Share - VIRTUAL	03/19/2025 - 03/19/2025	Attended
<b>Wayne Moore</b>			
A	1 Edu - CII 2024 Fall Conference - Brooklyn NY	09/09/2024 - 09/11/2024	Attended
	2 Edu - Harvard Business School Executive Education Program: Audit Committees in a New Era of Governance - Boston MA	11/20/2024 - 11/22/2024	Attended
	3 Edu - NCPERS 2025 Pension Communication Summit - Washington, DC	01/26/2025 - 01/27/2025	Attended
	4 Edu - IFEBP Health Care Management Conference 2025 - Fort Meyers FL	04/28/2025 - 04/29/2025	Attended
B	- Edu - SACRS Fall Conference 2024 - Monterey CA	11/12/2024 - 11/15/2024	Attended
	- Edu - 2025 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/19/2025 - 03/20/2025	Attended
C	- Edu - NCPERS Legislative Conference & Policy Day - Washington, DC	01/27/2025 - 01/29/2025	Attended
V	- Edu - NCPERS 2024 Webinar - State and Federal Legislative Outlook for Public Pensions - VIRTUAL	12/05/2024 - 12/05/2024	Attended
<b>David Ryu</b>			
A	1 Edu - 2024 PPI Executive Seminar and Asia Roundtable - Hong Kong	10/20/2024 - 10/25/2024	Attended
B	- Edu - AAAIM Elevate 2024 - Los Angeles CA	10/08/2024 - 10/08/2024	Attended

Category Legend:

A - Pre-Approved/Board Approved Educational Conferences

B - 1) Board Approved Administrative Meetings and 2) Pre-Approved Educational Conferences in CA where total cost is no more than \$3,000 provided that a Trustee may not incur over \$15,000 for all expenses of attending all such Educational Conferences and Administrative Meetings in a fiscal year per Trustee Travel Policy; Section III.A

C - Second of two conferences and/or meetings counted as one conference per Trustee Education Policy Section IV.C.2 and Trustee Travel Policy Section IV.

V - Virtual Event

X - Canceled events for which expenses have been incurred.

**FOR INFORMATION ONLY**

July 1, 2025

TO: Each Trustee  
Board of Retirement

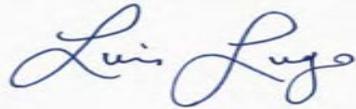
FROM: Barry W. Lew   
Legislative Affairs Officer

FOR: July 10, 2025 Board of Retirement Meeting

SUBJECT: **Monthly Status Report on Legislation**

Attached is the monthly report on the status of legislation that staff is monitoring. Bills on which LACERA has adopted a position are highlighted in yellow.

**Reviewed and Approved:**



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**Luis Lugo, Deputy Chief Executive Officer**

**Attachments**

LACERA Legislative Report Index  
LACERA Legislative Report

cc: Santos H. Kreimann  
Luis Lugo  
JJ Popowich  
Laura Guglielmo  
Steven P. Rice  
Jon Gabel  
Scott Zdrasil  
Anthony Roda, Williams & Jensen  
Naomi Padron, MKP Government Relations

CATEGORY	BILL	AUTHOR	TITLE	BOR Position	PAGE
BROWN_ACT	AB 259	Blanca E. Rubio (D)	Open Meetings: Local Agencies: Teleconferences		2
BROWN_ACT	AB 409	Joaquin Arambula (D)	Open Meetings: Teleconferences: Community College		6
BROWN_ACT	AB 467	Mike Fong (D)	Open Meetings: Teleconferences: Neighborhood Councils		7
BROWN_ACT	SB 239	Jesse Arreguin (D)	Open Meetings: Teleconferencing: Subsidiary Body		19
BROWN_ACT	SB 707	Maria Elena Durazo (D)	Open Meetings: Meeting and Teleconference Requirements		23
PUBLIC_EMPLOYMENT	AB 288	Tina McKinnor (D)	Employment: Labor Organization		3
PUBLIC_EMPLOYMENT	AB 339	Liz Ortega (D)	Local Public Employee Organizations: Notice Requirement		4
PUBLIC_EMPLOYMENT	AB 340	Patrick Ahrens (D)	Employer-Employee Relations: Confidential Communication		5
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**Term:**

No term applied.

**Tracking**

Include tracked measures only

1.

## California Assembly Bill 26 (2025-2026)

CAA 26 | [Carl DeMaio \(R-075\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | ASSEMBLY

### Eliminate the Politicians Perks Act of 2025

States the intent of the Legislature to enact legislation that holds elected officials accountable by prohibiting Members of the Legislature from accepting gifts or trading in individual stock, imposing a lifetime lobbying ban, eliminating exemptions for the Legislature from labor, workplace, and public record laws, and eliminating government pensions for local elected officials.

**Code:**

An act relating to the Political Reform Act of 1974.

**Status:**

Dec 2, 2024: INTRODUCED.

 PUBLIC\_RETIREMENT

| No tags, commentary, or attachment applied

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2.

## California Assembly Bill 259 (2025-2026)

CAA 259 | [Blanca E. Rubio \(D-048\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |  
Senate Local Government Committee

### Open Meetings: Local Agencies: Teleconferences

Provides that existing law, until the specified date, authorizes the legislative body of a local agency to use alternative teleconferencing under certain conditions. Extends the alternative teleconferencing procedures until the specified date.

#### Code:

An act to amend and repeal Sections 54953 and 54954.2 of the Government Code, relating to local government.

#### Status:

**May 14, 2025:** To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.  
[+ Show full status history](#)

#### Hearing Dates:

**07/15/2025** Judiciary

 BROWN\_ACT

| No tags, commentary, or attachment applied

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3.

## California Assembly Bill 288 (2025-2026)

CAA 288 | [Tina McKinnor \(D-061\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |  
Senate Judiciary Committee

### Employment: Labor Organization

Expands the Public Employment Relations Board's jurisdiction by authorizing a worker to petition PERB to protect and enforce specified prescribed rights. Specifies who is an authorized worker, including an individual who seeks to have the National Labor Relations Board to protect and enforce their rights to full freedom of association, self-organization, or designation of representatives of their own choosing but has not received a determination or remedy within specified statutory timeframes.

#### Code:

An act to add Section 923.1 to the Labor Code, relating to employment.

#### Status:

**June 19, 2025:** In SENATE. Read second time and amended. Re-referred to Committee on JUDICIARY.

[+ Show full status history](#)

#### Hearing Dates:

**07/08/2025** Judiciary



**PUBLIC\_EMPLOYMENT**

| No tags, commentary, or attachment applied

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4.

## California Assembly Bill 339 (2025-2026)

CAA 339 | [Liz Ortega \(D-020\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Labor, Public Employment and Retirement...

### Local Public Employee Organizations: Notice Requirement

Relates to collective bargaining of local represented employees. Provides that existing law requires the governing body of a public agency to give reasonable written notice to each affected recognized employee organization of certain ordinances, rules, resolutions, or regulations. Requires the governing body to give the organization no less than a certain number of days' notice before issuing a request for proposals, request for quotes, or renewing or extending an existing contract for certain services.

**Code:**

An act to add Section 3504.1 to the Government Code, relating to public employment.

**Status:**

**June 18, 2025:** In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

**June 18, 2025:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

[+ Show full status history](#)

**Hearing Dates:**

**07/09/2025** Labor, Public Employment and Retirement

 PUBLIC\_EMPLOYMENT

| No tags, commentary, or attachment applied

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5.

## California Assembly Bill 340 (2025-2026)

CAA 340 | [Patrick Ahrens \(D-026\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |  
Senate Judiciary Committee

### Employer-Employee Relations: Confidential Communication

Prohibits a public employer from compelling a public employee, a representative of a recognized employee organization, or an exclusive representative to disclose confidential communications to a third party. Provides that this would not apply to a criminal investigation or when a public safety officer is under investigation and certain circumstances exist.

#### Code:

An act to ~~amend Sections 3506.5, 3519, 3543.5, and 3571 of the Government Code, and to amend Section 28858 of the Public Utilities~~ add Section 3558.9 to the Government Code, relating to employer-employee relations.

#### Status:

**June 25, 2025:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on JUDICIARY.

[+ Show full status history](#)

#### Hearing Dates:

**07/15/2025** Judiciary



**PUBLIC\_EMPLOYMENT**

| No tags, commentary, or attachment applied

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6.

## California Assembly Bill 409 (2025-2026)

CAA 409 | [Joaquin Arambula \(D-031\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Senate Local Government Committee

### Open Meetings: Teleconferences: Community College

Provides that existing law authorizes a California community college student body association or student-run community college organization to use alternate teleconferencing provisions if, among other things, at least a quorum of the members of the body participate from a singular physical location that is accessible to the public. Exempts from the quorum, physical location, and accommodation requirements the California Online Community College.

#### Code:

An act to amend Section 54953.9 of the Government Code, relating to open meetings.

#### Status:

**June 23, 2025:** In SENATE. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.

**June 23, 2025:** From SENATE Committee on LOCAL GOVERNMENT with author's amendments.

[+ Show full status history](#)

 BROWN\_ACT

| No tags, commentary, or attachment applied

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7.

## California Assembly Bill 467 (2025-2026)

CAA 467 | [Mike Fong \(D-049\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |  
Senate Local Government Committee

### Open Meetings: Teleconferences: Neighborhood Councils

Provides that existing law authorizes specified neighborhood city councils to use alternate teleconferencing provisions related to notice, agenda, and public participation if, among other requirements, the city council has adopted an authorizing resolution and 2/3 of the neighborhood city council votes to use alternate teleconference provisions. Extends the authorization for specified neighborhood city councils to use the alternate teleconferencing provisions until the specified date.

#### Code:

An act to amend Section 54953.8 of the Government Code, relating to local government.

#### Status:

**May 14, 2025:** To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.

[+ Show full status history](#)

#### Hearing Dates:

**07/15/2025**    Judiciary

 BROWN\_ACT

| No tags, commentary, or attachment applied

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8.

## California Assembly Bill 569 (2025-2026)

CAA 569 | [Catherine Stefani \(D-019\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Assembly Appropriations Committee

### California Public Employees' Pension Reform Act of 2013

Relates to the California Public Employees' Pension Reform Act of 2013. Authorizes a public employer to bargain over contributions for supplemental retirement benefits administered by, or on behalf of, an exclusive bargaining representative of one or more of the public employer's bargaining units, subject to certain limitations.

**Code:**

An act to amend Section 7522.18 of the Government Code, relating to retirement benefits.

**Status:**

**May 23, 2025:** In ASSEMBLY Committee on APPROPRIATIONS: Held in committee.

[+ Show full status history](#)



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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9.

## California Assembly Bill 810 (2025-2026)

CAA 810 | [Jacqui Irwin \(D-042\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Appropriations Committee

### Local Government: Internet Websites and Email Addresses

Provides that existing law requires that a local agency that maintains public email addresses to ensure that each email address provided to its employees uses a .gov domain name or a .ca.gov domain name. Requires a city, county, or city and county to comply with specified domain requirements. Requires a special district, joint powers authority, or other political subdivision to comply with similar domain requirements no later than the specified date.

**Code:**

An act to amend Section 50034 of the Government Code, relating to local government.

**Status:**

**May 23, 2025:** In ASSEMBLY Committee on APPROPRIATIONS. Held in committee and made a Two-year bill.

[+ Show full status history](#)



**PUBLIC\_RECORDS\_ACT**

| No tags, commentary, or attachment applied

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10.

## California Assembly Bill 889 (2025-2026)

CAA 889 | [Heather Hadwick \(R-001\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Labor, Public Employment and Retirement...

### Prevailing Wage: Per Diem Wages

Authorizes an employer to take full credit for the hourly amounts contributed to defined contribution pension plans that provide for both immediate participation and immediate vesting even if the employer contributes at a lower rate or does not make contributions to private construction. Requires the employer to prove that the credit for employer payments was calculated properly.

#### Code:

An act to amend Section 1773.1 of the Labor Code, relating to prevailing wage.

#### Status:

**June 11, 2025:** In SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Not heard.

[+ Show full status history](#)

#### Hearing Dates:

**07/09/2025** Labor, Public Employment and Retirement



**PUBLIC\_EMPLOYMENT**

| No tags, commentary, or attachment applied

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11.

## California Assembly Bill 1054 (2025-2026)

CAA 1054 | [Mike A. Gipson \(D-065\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Public Employment and Retirement...

### Public Employees Retirement: Deferred Retirement Option

Establishes the Deferred Retirement Option Program as a voluntary program within the Public Employees Retirement System for employees of State Bargaining Units 5 (Highway Patrol) and 8 (Firefighters). Requires these State bargaining units to bargain with the Department of Human Resources to implement the program. Requires the program to result in a cost savings or be cost neutral. Requires the department to work with the Board of PERS to develop the program.

**Code:**

An act to ~~amend Section 20000 of~~ add Chapter 20 (commencing with Section 21717) to Part 3 of Division 5 of Title 2 of the Government Code, relating to retirement.

**Status:**

- Mar 24, 2025:** In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
- Mar 24, 2025:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
- Mar 24, 2025:** To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.  
[+ Show full status history](#)



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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12.

## California Assembly Bill 1067 (2025-2026)

CAA 1067 | [Sharon Quirk-Silva \(D-067\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Labor, Public Employment and Retirement...

### Public Employees Retirement: Felony Convictions

Requires a public employer that is investigating a public employee for misconduct arising out of or in the performance of the public employee's official duties in pursuit of the office or appointment, or in connection with obtaining salary, disability retirement, service retirement, or other benefits, to continue the investigation even if the public employee retires while under investigation, if the investigation indicates that the public employee may have committed a crime.

**Code:**

An act to add Section 7522.76 to the Government Code, relating to public employees' retirement.

**Status:**

**June 18, 2025:** To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

[+ Show full status history](#)

**Hearing Dates:**

**07/09/2025** Labor, Public Employment and Retirement



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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13.

## California Assembly Bill 1323 (2025-2026)

CAA 1323 | [Phillip Chen \(R-059\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Assembly Public Employment and Retirement...

### County Employees Retirement: Administration

Provides that the County Employees Retirement Law authorizes counties to establish retirement systems pursuant to its provisions in order to provide pension benefits to county, city, and district employees and their beneficiaries. Provides that existing law sets forth the membership composition for boards of retirement and boards of investment. Authorizes the compensation rate to be increased by the board of retirement, for members in Orange County only, to not more than a specified amount per meeting.

#### Code:

An act [to amend Section 31521 of the Government Code](#), relating to public [employees'](#) retirement.

#### Status:

- Mar 24, 2025:** In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
- Mar 24, 2025:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
- Mar 24, 2025:** To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.  
[+ Show full status history](#)



PUBLIC\_RETIREMENT

| No tags, commentary, or attachment applied

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14.

## California Assembly Bill 1383 (2025-2026)

CAA 1383 | [Tina McKinnor \(D-061\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |  
Assembly Appropriations Committee

### Public Employees Retirement Benefits

Provides that the State Public Employees' Pension Reform Act requires each retirement system that offers a defined benefit plan for safety members of the Public Employees' Retirement System to use certain formulas for safety members. Establishes new retirement formulas. Authorizes a public employer and a recognized employee organization to negotiate a prospective increase to the retirement benefit formulas for members and new members, consistent with the formulas permitted under the act. Appropriates funds.

#### Code:

An act to amend ~~Section 7522.10~~ of Sections 7522.10, 7522.25, and 7522.30 of, and to add Sections 7522.19 and 7522.26 to, the Government Code, relating to public employees' retirement, and making an appropriation therefor.

#### Status:

May 25, 2025: In ASSEMBLY. Coauthors revised.

[+ Show full status history](#)



#### PUBLIC\_RETIREMENT

##### Tags:

Staff\_Recommendation: Neutral

IBLC\_Recommendation: Watch

BOR\_Position: Watch

##### Commentary:

###### Comment:

Jul 1, 2025 - 10:46 A.M. (PDT)

Bill was held in the Appropriations Committee and will not move for the rest of 2025. Bill will be reconsidered in the 2026 legislative year.

15.

## California Assembly Bill 1439 (2025-2026)

CAA 1439 | [Robert Garcia \(D-050\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Public Employment and Retirement...

### Public Retirement Systems: Development Projects: Labor

Prohibits the board of a public pension or retirement system from making any additional or new investments of public employee pension or retirement funds in development projects in the State or providing financing for those projects with public employee pension or retirement funds unless those projects include labor standards protections.

#### Code:

An act to ~~amend Section 70397 of the Government Code, relating to courts.~~ [add Section 7513.77 to the Government Code, relating to public retirement systems.](#)

#### Status:

- Mar 24, 2025:** In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
- Mar 24, 2025:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
- Mar 24, 2025:** To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.  
[+ Show full status history](#)

#### PUBLIC\_INVESTMENT

Commentary:

**Comment:**

Apr 25, 2025 - 2:03 P.M. (PDT)

The bill has been pulled from further consideration for 2025 and will be revisited in 2026.

16.

## California Assembly Bill 1451 (2025-2026)

CAA 1451 | [Al Muratsuchi \(D-066\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | ASSEMBLY

### State Teachers' Retirement System

Makes a nonsubstantive change to the provision naming the Teachers' Retirement Law.

**Code:**

An act to amend Section 22000 of the Education Code, relating to teachers' retirement.

**Status:**

**Feb 21, 2025:** INTRODUCED.



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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17.

## California Assembly Constitutional Amendment 2 (2025-2026)

CAACA 2 | [Corey Jackson \(D-060\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | ASSEMBLY

### Legislature: Retirement

Creates the Legislative Diversification Act, to repeal a prohibition of members of the Legislature accruing any pension or retirement benefit as specified and instead require the Legislature to establish a retirement system for members elected to or serving in the Legislature on specified date.

#### Code:

A resolution to propose to the people of the State of California an amendment to the Constitution of the State, by repealing and adding Section 4.5 of Article IV thereof, relating to the Legislature.

#### Status:

Dec 2, 2024: INTRODUCED.



PUBLIC\_RETIREMENT

| No tags, commentary, or attachment applied

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18.

## California Senate Bill 8 (2025-2026)

CAS 8 | [Angelique Ashby \(D-008\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Assembly Insurance Committee

### Peace Officers: Injury or Illness: Leaves of Absence

Provides that existing law entitles local law enforcement, probation officers and firefighters to a leave of absence while disabled by injury or illness arising out of their duties. Provides that existing law provides that such leave is in lieu of temporary disability payments or maintenance allowance payments otherwise payable under the workers compensation system. Entitles specified peace officers who are employed on a regular, full time basis by a county of the eighth class to this leave.

#### Code:

An act to amend Section 4850 of the Labor Code, relating to public employment.

#### Status:

**June 5, 2025:** To ASSEMBLY Committee on INSURANCE.

[+ Show full status history](#)

#### WORKERS\_COMPENSATION

| No tags, commentary, or attachment applied

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19.

## California Senate Bill 239 (2025-2026)

CAS 239 | [Jesse Arreguin \(D-007\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Senate Inactive File

### Open Meetings: Teleconferencing: Subsidiary Body

Provides that the Ralph M. Brown Act requires that all meetings of a legislative body be open and public and that all persons be permitted to attend and participate. Authorizes a subsidiary body to use alternative teleconferencing provisions and imposes requirements for notice, agenda, and public participation. Requires the subsidiary body to post the agenda at each physical meeting location designated by the subsidiary body.

#### Code:

An act to add and repeal Section 54953.05 of the Government Code, relating to local government.

#### Status:

**June 3, 2025:** In SENATE. From third reading. To Inactive File.

[+ Show full status history](#)

#### Hearing Dates:

**07/01/2025** Senate Inactive File - # A-1



BROWN\_ACT

| No tags, commentary, or attachment applied

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20.

## California Senate Bill 301 (2025-2026)

CAS 301 | [Timothy S. Grayson \(D-009\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |  
Assembly Third Reading File

### County Employees Retirement Law of 1937: Employees

Prohibits a county or district whose officers and employees are enrolled as members of a retirement system under the County Employees Retirement Law of 1937 from excluding from membership in the system any employee, group, or classification, other than excludable officers and employees.

**Code:**

An act to add Section 31566 to the Government Code, relating to retirement.

**Status:**

**June 26, 2025:** In ASSEMBLY. Read second time. To third reading.

[+ Show full status history](#)

**Hearing Dates:**

**07/01/2025** Assembly Third Reading File - # 19



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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21.

## California Senate Bill 443 (2025-2026)

CAS 443 | [Susan Rubio \(D-022\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |  
Assembly Appropriations Committee

### Retirement: Joint Powers Authorities

Authorizes the Pajaro Regional Flood Management Agency, a joint powers authority, to provide a defined benefit plan or formula to an employee of a member agency of the joint powers authority, or of another public agency who is not a new member and who is subsequently employed by the joint powers authority, within a specified number of days of the effective date of the retirement plan contract amendment.

#### Code:

An act to amend ~~Section~~ [Sections 7522.02 and](#) 7522.05 of the Government Code, relating to retirement.

#### Status:

**June 25, 2025:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

[+ Show full status history](#)

#### Hearing Dates:

**07/02/2025** Appropriations

 PUBLIC\_RETIREMENT

| No tags, commentary, or attachment applied

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22.

## California Senate Bill 538 (2025-2026)

CAS 538 | [Megan Dahle \(R-001\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |  
Senate Labor, Public Employment and Retirement...

### Public Employees' Retirement System: Teaching

Authorizes member providing services as a substitute teacher, as defined, under certain circumstances to elect to retain coverage under the Public Employees' Retirement System.

#### Code:

An act to amend Section 20309 of the Government Code, relating to public employee's retirement.

#### Status:

**Mar 5, 2025:** To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

[+ Show full status history](#)



**PUBLIC\_RETIREMENT**

| No tags, commentary, or attachment applied

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23.

## California Senate Bill 707 (2025-2026)

CAS 707 | [Maria Elena Durazo \(D-026\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Local Government Committee

### Open Meetings: Meeting and Teleconference Requirements

Requires an eligible legislative body to comply with certain meeting requirements, including that, with specified exceptions, all open and public meetings include an opportunity for members of the public to attend via a 2 way telephonic service or a 2 way audiovisual platform and that the eligible legislative body take specified actions to encourage residents to participate in public meetings. Includes teleconferenced meetings in certain provisions regarding the removal of individuals disrupting a meeting.

#### Code:

An act to amend Sections 54952, 54952.7, 54953, 54953.5, 54953.7, 54954.2, 54954.3, 54956, 54956.5, ~~54957.1~~, 54957.6, ~~54960~~, 54957.95, and 54960.2 of, to amend and repeal Section 54952.2 of, to add Sections 54953.8, 54953.8.1, ~~and 54953.8.2~~ 54953.8.2, and 54953.10 to, and to add and repeal Sections 54953.8.3, 54953.8.4, 54953.8.5, 54953.8.6, 54953.8.7, and 54953.9 of, the Government Code, relating to local government.

#### Status:

**June 9, 2025:** To ASSEMBLY Committee on LOCAL GOVERNMENT.

[+ Show full status history](#)

#### Hearing Dates:

**07/16/2025** Local Government

 BROWN\_ACT

| No tags, commentary, or attachment applied

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24.

## California Senate Bill 853 (2025-2026)

CAS 853 | Labor, Public Employment and Retirement | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Appropriations Committee

### Public Employees' Retirement

Provides that under the Public Employees' Retirement Law, the compensation earnable during any period of service as a member of the Judges' Retirement System, the Judges' Retirement System II, the Legislators' Retirement System, or the Defined Benefit Program of the State Teachers' Retirement Plan is considered compensation earnable as a member of the Public Employees' Retirement System for purposes of computing final compensation for the member, if that member retires concurrently under both systems.

#### Code:

An act to amend Sections 22104.8, 22131, 22146.5, 22713, 22954, 22955, 22955.1, 24616.2, and 26122 of the Education Code, and to amend Sections 7522.02, 20034, 20069, 20638, 20639, 31462.05, 31470.14, and 31680.9 of the Government Code, relating to public retirement systems.

#### Status:

**June 25, 2025:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

[+ Show full status history](#)

#### Hearing Dates:

**07/02/2025** Appropriations

#### PUBLIC\_RETIREMENT

Tags:

Staff\_Recommendation:

IBLC\_Recommendation:

BOR\_Position:

25.

## United States Senate Bill 1504 (2025-2026)

USS 1504 | [Bill Cassidy \(R-LA\)](#) and 4 Co-sponsors | Pending | Senate Finance Committee

### Social Security Administration

Requires the Social Security Administration to make changes to the social security terminology used in the rules, regulation, guidance, or other materials of the Administration.

#### Status:

**Apr 29, 2025:** To SENATE Committee on FINANCE.

**Apr 29, 2025:** In SENATE. Read second time.

**Apr 29, 2025:** INTRODUCED.

[+ Show full status history](#)

#### SOCIAL\_SECURITY

| No tags, commentary, or attachment applied

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26.

## United States Senate Bill 1505 (2025-2026)

US S 1505 | [Bill Cassidy \(R-LA\)](#) and 3 Co-sponsors | Pending | Senate Finance Committee

### Social Security Beneficiaries

Ensures that Social Security beneficiaries receive regular statements from the Social Security Administration.

#### Status:

**Apr 29, 2025:** To SENATE Committee on FINANCE.

**Apr 29, 2025:** In SENATE. Read second time.

**Apr 29, 2025:** INTRODUCED.

[+ Show full status history](#)

#### Related:

[US S 345](#)

 SOCIAL\_SECURITY

| No tags, commentary, or attachment applied

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