

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.gov

**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., WEDNESDAY, AUGUST 5, 2026*

This meeting will be conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953.8.3.

Any person may view the meeting in person at LACERA's offices or online at <https://LACERA.gov/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 SB707
 - A. Just Cause (Section 54953.8.3)
 - B. Statement of Persons Present at SB707 Teleconference Locations
- IV. APPROVAL OF THE MINUTES
 - A. Approval of the Minutes of the Regular Meeting of July 1, 2026
- V. PUBLIC COMMENT

(Members of the public may address the Board orally and in writing. To provide Public Comment, you should visit <https://LACERA.gov/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.gov.)

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 July 28, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated July 28, 2026)

B. **Dismiss with Prejudice the Appeal of Malaysia L. Gandy Locklin**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Malaysia L. Gandy Locklin's appeal for a service-connected disability retirement. (Memo dated July 14, 2026)

C. **Appeals for the Board of Retirement's Meeting of August 5, 2026**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement grant the appeals and requests for administrative hearing received from Eric J. Gunn (Dec'd); Rosa Gunn (Surv.) and Kenneth F. Jones Jr. and direct the Disability Retirement Services Manager to refer each case to a referee. (Memo dated July 17, 2026)

VIII. CONSENT ITEMS (Continued)

D. **Ratification of Reciprocal Disability Retirements**

Recommendation as submitted by Louis Gittens, Benefits Manager: That the Board approve the outgoing reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency for the performance of their duties and have met the burden of proof. (Memo dated July 20, 2026)

E. **Minor Update to LACERA's Code of Ethical Conduct**

Recommendation as submitted by Steven P. Rice, Chief Counsel, Allison E. Barrett, Senior Staff Counsel, and Jessica Rivas, Staff Counsel: That the Board approves a minor update to the Code of Ethical Conduct concerning LACERA Trustee elections and political activity. (Memo dated July 15, 2026)

F. **Pensionability Analysis Under CERL and PEPRA For New Pay Items**

Recommendation as submitted by Jean Kim, Sr. Staff Counsel that the Board: 1. Approve the recommendations set forth above as to the three new pay items. 2. Instruct staff to coordinate with the Auditor-Controller to establish the necessary reporting mechanisms and procedures to permit LACERA to implement such determinations when calculating final compensation for legacy and PEPRA members. (Memo dated July 7, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. NON CONSENT ITEMS

A. **Vendor Recommendation – Knowledge Management System**

Recommendation as submitted by Eugenia W. Der, Senior Staff Counsel and David Choe, Project Manager: That the Board of authorize staff to engage with Oxcyon, Inc. to provide an enterprise-wide knowledge management system to digitally capture, document, organize, and access critical business knowledge and information. The first-year cost is \$451,750 (which includes implementation, licensing, and cloud hosting). The total anticipated cost over three years is \$992,750. This solution is budgeted under the Systems Division for Fiscal Year 2026-2027 for \$500,000. (Presentation) (Memo dated July 6, 2026)

XI. REPORTS

- A. **Angela Cooley, Legal Intern**
(Capstone Presentation for Summer of 2026)
- B. **Sophia Hua, Legal Intern**
(Capstone Presentation for Summer of 2026)
- C. **LACERA Property and Liability Insurance Renewal Summary Update**
James C. Beasley, Jr., Supervising Administrative Assistant II
(For Information Only) (Memo dated July 17, 2026)
- D. **Contract Activity Report – June 2026**
Ricki Contreras, Administrative Services Division Manager
Elsy Gutierrez, Supervising Administrative Assistant II
(For Information Only) (Memo dated July 20, 2026)
- E. **4th Quarter Paid Invoice Summary & Threshold Report – April 1, 2026 to June 30, 2026**
Tamara Caldwell, Division Manager, Disability Retirement Services
(For Information Only) (Memo dated June 16, 2026)
- F. **Report of Revised Pay Item**
Jean J. Kim, Sr. Staff Counsel
(For Information Only) (Memo dated July 7, 2026)
- G. **Monthly Status Report on Legislation**
Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated July 22, 2026)
- H. **Monthly Trustee Travel and Education Report - June 2026**
Ted Granger, Chief Financial Officer
(For Information Only) (Memo dated July 23, 2026)
- I. **July 2026 Fiduciary Counsel Contact and Billing Report**
Steven P. Rice, Chief Counsel
(For Information Only) (Memo dated (Memo dated July 27, 2026))
(Privileged and Confidential/Attorney-Client Communication/Attorney Work Product and Exempt from Disclosure under California Government Code Sections 7927.705, 54957.5(a))

XI. REPORTS (Continued)

J. **Status of Fiduciary Counsel Engagements**

Steven P. Rice, Chief Counsel

Francis J. Boyd, Senior Staff Counsel

(For Information Only) (Memo dated July 27, 2026)

(Attachment to Public Cover Memo is 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 agendized 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 with Legal Counsel – Anticipated Litigation

Significant Exposure to Litigation

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

1. Administrative Appeal of Jimmy C. Lim
2. Administrative Appeal of Member Roque Roque

XVI. EXECUTIVE SESSION (Continued)

B. Conference with Legal Counsel—Existing Litigation
Paragraph (1) of subdivision (d) of Section 54956.9

1. *LACERA v. Marquez*
Los Angeles Superior Court, Los Angeles Superior Court,
Case No. 25NNCV03240
U.S. Bankruptcy Court, Central District of California,
Case No. 6:26-bk-16063-SY
(Presentation) (Memo dated July 29, 2026)
2. *LACERA v. County of Los Angeles*
California Supreme Court, Case No. S286264
(Memo dated July 29, 2026)

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. (PT) Monday through Friday and will also be posted on lacera.gov 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 - 8:30 a.m. to 5:00 p.m. (PT) Monday through Friday or email PublicComment@lacera.gov, 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, JULY 1, 2026

This meeting was conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953.8.3.

TRUSTEES PRESENT:

Les Robbins, Secretary Acting Chair

Nancy Durazo

Bobbie Fesler

Elizabeth Ginsberg

Jason E. Green (Safety Alternate)

Aleen Langton

Ernesto J. Pantoja

ABSENT:

JP Harris, Chair (Retired Alternate)

Shawn R. Kehoe

Wayne Moore, Vice Chair

David Ryu

STAFF ADVISORS AND PARTICIPANTS

Luis A. Lugo, Chief Executive Officer

JJ Popowich, Chief Benefits Officer

Jessica Baxter, Chief Administrative Officer

Steven P. Rice, Chief Counsel

Francis J. Boyd, Senior Staff Counsel

Allison Barrett, Senior Staff Counsel

Tamara Caldwell, Disability Retirement Manager

Christine Roseland, Senior Staff Counsel

I. CALL TO ORDER

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

II. PLEDGE OF ALLEGIANCE

Trustee Green led the Trustees and staff in reciting the Pledge of Allegiance.

III. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER SB707

A. Just Cause (Section 54953.8.3)

B. Statement of Persons Present at SB707 Teleconference Locations

There was nothing to report. No trustees participated under Section 54953.8.3.

IV. APPROVAL OF THE MINUTES

A. Approval of the Minutes of the Regular Meeting of June 3, 2026

Trustee Pantoja made a motion, Trustee Langton seconded, to approve the minutes of the Regular Meeting of June 3, 2026. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

V. PUBLIC COMMENT

There were no requests made by the public to speak.

VI. EXECUTIVE UPDATE

A. LACERA All Stars

Mr. Popowich announced the winners for the month: Alexander Del Rosario, Alex Yin, Andrea Ellison and Adam Quinteros. The web watcher winner was Vache Mahseredjian and the Rideshare winner was Liliana Ronquillo.

B. Member Spotlight

Mr. Popowich recognized LACERA member, Leilani Ignacio.

C. 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 EnforcementService-Connected Disability Applications

On a motion by Trustee Green, seconded by Trustee Fesler, 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>
953E*	DOLEN, GERALD L.
954E	BLAGG, STEVEN W.
955E	SANDOVAL, JOSE A.
956E	PAYNE, DAVID R.
957E	QUICK, JOHNNY G.
958E	MILLER-LEFORBES, BRIANNA C.
959E*	PARTIN, MICHAEL E.
960E	HANNEMANN, MICHAEL W.
961E*	STELLA, JAMES C., JR.
962E	RODRIGUEZ, REBECCA L.
963E	GEISBAUER, ANTHONY W.
964E	BARNETT, JOEL L.
965E	PERALTA, SERGIO
966E	REINECKER, PAXTON A.
967E	CARD, KEVIN M.
968E	CABRERA, STEPHEN M.
969E	SCHWARTZ, MICHAEL L.
970E	ABRAHAM, TAMAR L.
971E	LOPEZ, BERNIE R.
972E	MCKELVY, ERMINA L.
973E	HERMANN, JOHN W.
974E	WILLIAMS, JULIE L.
975E	CALDERARO, CHARLES
976E	NANQUIL, JOSE M.
977E	PANGILINAN, SAMUEL N.
978E*	TURRILL, KEVIN J.
979E	MUEHLICH, RICHARD L.
980E	GARCIA, SILVANO, JR.

*Granted SCD – Retroactive

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued) Service-Connected Disability Applications

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

Safety Fire, Lifeguards Service-Connected Disability Applications

On a motion by Trustee Green seconded by Trustee Pantoja, 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>
1119C	PIRAINO, JEFFREY R.
1120C*	CORNEJO, RONALD D.
1121C*	TEIXEIRA, ROBERT S.
1122C*	NICOLAIDES, MICHAEL J.
1123C	FERNANDEZ, JAMES A.
1124C*	EVANS, BRAD
1125C*	RIVERA, JOHN A.
1126C*	LAWRENCE, MICHAEL W.
1127C	BOYCE, WILLIAM M.
1128C	COLLINS, CHRISTOPHER A.
1129C	GEORGE, ROBERT B.
1130C	ALLEMAN, RICK C.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

*Granted SCD – Retroactive

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Service-Connected Disability Applications

On a motion by Trustee Pantoja seconded by Trustee Robbins, 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>
2187D*	HIRIGOYEN, MARILYNN
2188D	CLARK, DERRICK U.
2189D	MOLINA, ANNA L.
2190D**	ALLEN, CYNTHIA L.
2191D	DECHANNES, NANCY E.
2192D***	LOEK, VESNA P.
2193D****	MENDEZ, RAQUEL
2194D	HARRIS, BRIAN A.
2195D	SAMPSON, SHOMARI
2196D*	MELENDEZ, YANIRA C.
2197D***	GALLEGOS, CHRISTINE A.
2198D*	QUEZADA, LETICIA
2199D**	GAO, SARAH C.
2200D	LINO, KIM C.
2201D**	BANUELOS, RUBEN, JR.
2202D***	DUGAN, ELISABETH L.
2203D***	JOHNSON, EDIE S.
2204D	JOSEPH, MAYRA
2205D	CRUZ, JOSE J.
2206D	KAHSAY, MULUBRHAN
2207D***	RODRIGUEZ, BRENDA P.
2208D	MONTANO-LOPEZ, IRENE
2209D	LAW, SHANELL M.
2210D	SMITH, LESLIE C

*Granted SCD – SCD Retro

**Granted SCD – Employer Cannot Accommodate

***Granted SCD – Salary Supplement

****Granted SCD – Retroactive Employer Cannot Accommodate

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members (Continued)

Service-Connected Disability Applications

<u>APPLICATION NO.</u>	<u>NAME</u>
2211D*	CALHOUN, VINCENT L.
2212D**	GUTIERREZ, RAUL
2213D	JAMES, NICOLE E.
2214D	RAMIREZ, JEFFREY F.
2215D	TAPIA, STELLA
2216D**	ARGUIJO, LAURA A.
2217D	SMITH, MARCUS A., JR.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

VIII. CONSENT ITEMS

Trustee Fesler made a motion, Trustee Langton seconded, to approve consent items A-D. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

A. Ratification of Service Retirement and Survivor Benefit Application Approvals

Recommendation that the Board approve the service retirements and survivor benefit applications received as June 22, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated June 22, 2026)

B. Dismiss with Prejudice the Appeal of Beverly A. La Cour

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Beverly A. La Cour's appeal for a service-connected disability retirement. (Memo dated June 11, 2026)

*Granted SCD – SCD Retro

** Granted SCD – Salary Supplement

VIII. CONSENT ITEMS (Continued)

C. **Appeals for the Board of Retirement's Meeting of July 1, 2026**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement grant the appeal and request for administrative hearing received from Charles M. Richardson and Benjamin Alvarez and direct the Disability Retirement Services Manager to refer the case to a referee.

(Memo dated June 15, 2026)

D. **Pensionability Analysis Under CERL And PEPRA for New Pay Items**

Recommendation as submitted by Jean Kim, Sr. Staff Counsel that the Board 1.) Approve the recommendations set forth above as to the two new pay items. 2.) Instruct staff to coordinate with the Auditor-Controller to establish the necessary reporting mechanisms and procedures to permit LACERA to implement such determinations when calculating final compensation for legacy and PEPRA members.

(Memo dated June 15, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. NON CONSENT ITEMS

A. **Finding of Exceptional Circumstances and Approval to Rehire Margo McCabe as a 960-Hour Employee to Perform Critical Legal Transactions Work of Limited Duration; Fiscal Year 2025-26 Report of Hours Worked**

Recommendation as submitted by Luis A. Lugo, Chief Executive Officer: That the Board find that exceptional circumstances exist to approve the rehire of retiree Margo McCabe for up to 960 hours in Fiscal Year 2026-27 to assist the Legal Division with critical needs relating to a pending and ongoing transactional work and complete the transition of technical knowledge to a recently hired employee regarding support for investment transactions.

(Memo dated June 18, 2026)

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

X. NON CONSENT ITEMS (Continued)

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

XI. REPORTS

A. **Contract Activity Report – May 2026**

Ricki Contreras, Administrative Services Division Manager

Elsy Gutierrez, Supervising Administrative Assistant II

(For Information Only) (Memo dated June 17, 2026)

This item was received and filed.

B. **Monthly Status Report on Legislation**

Barry W. Lew, Legislative Affairs Officer

(For Information Only) (Memo dated June 17, 2026)

This item was received and filed.

C. **Monthly Trustee Travel & Education Report – May 2026**

Ted Granger, Chief Financial Officer

(For Information Only) (Memo dated June 17, 2026)

This item was received and filed.

D. **June 2026 Fiduciary Counsel Contact and Billing Report**

Steven P. Rice, Chief Counsel

(For Information Only) (Memo dated June 22, 2026)

(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

There were no items for staff review.

XIII. ITEMS FOR FUTURE AGENDAS

There was nothing to report.

XIV. GOOD OF THE ORDER
(For Information Purposes Only)

There was nothing to report.

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME AND BOARD ACTION

5496B – URIBE, GABRIELA A.

Trustee Robbins made a motion, Trustee Langton seconded to grant a nonservice-connected disability retirement pursuant to Government Code sections 31720. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

APPLICATION NO. & NAME AND BOARD ACTION

5484B - GUNN, ERIC J. (DEC'D)

Trustee Langton made a motion, Trustee Robbins seconded to deny a service-connected disability retirement, survivor benefit. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Green, Langton, Pantoja, Robbins

XVI. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 9:26 a.m.

LES ROBBINS, SECRETARY

JP HARRIS, 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 has recently retired.



MEMBER SPOTLIGHT

Retired Member

Dushyant Bala

Admin. Services Manager, Department of Consumer and Business Affairs

Years of Service: 26

Notable Contributions: Dushyant Bala retired in June after 26 years of dedicated service to Los Angeles County. He began his public service career in the Agriculture Commissioner Weights and Measures Department, before moving to the Parks and Recreation department. In his most recent role, Dushyant helped manage operational needs at the Hall of Records.

Proudest Accomplishment: Dushyant's proudest moments came from serving his community. Whether directly or behind-the-scenes, he takes pride in doing work that has a positive impact on L.A. County residents.

Retirement Plans: Dushyant has a long list of retirement plans, starting with earning a Master's Degree in history. He will begin his Master's program at California State Polytechnic University, Pomona in August. He is also looking forward to having more time for his hobbies, including yoga, tennis, and reading.



Chief Executive Officer's Report

A u g u s t 2 0 2 6

Prepared for the Board of Retirement and Board of Investments



01

SECTION ONE

Organizational Updates

Board initiatives, hiring, and key events

LACERA Updates



Key initiatives and upcoming engagements across the organization

MEASURE G

County Governance Reform

Monitoring Implementation

Measure G reshapes Los Angeles County governance, expanding the Board of Supervisors and establishing an elected County Executive through a phased rollout. Staff continue to monitor developments and assess potential implications for LACERA's governance and plan administration.

STAKEHOLDER ENGAGEMENT

External Outreach & Partnerships

Community & County Meetings

Ongoing engagement with key stakeholders included a meeting with Board of Supervisors Holly Mitchell and a presentation to the Rotary Club of Pasadena. These conversations strengthen relationships across the County and community while advancing awareness of LACERA's mission and priorities.

GENERAL ELECTIONS

*Three-Year Term Effective January 1, 2027 –
December 31, 2029*

2026 Election Calendar

Election of the Second and Eighth Members and Alternate Retired Member of the Board of Retirement, and the Second and Eighth Members of the Board of Investments for LACERA. Voting began on August 3rd and ends on August 28th. The Board of Supervisors will certify the election results by October 20th.

Hiring Update

Reporting Period: June 16, 2026 – July 15, 2026



RECRUITMENTS UNDERWAY

Active searches across divisions

- **Administrative Services** Document Processing Supervisor
- **Ethics & Compliance Office** Chief Ethics and Compliance Officer
- **Human Resources** Senior Human Resources Analyst - Disability Management Compliance and Talent Acquisition (Interdepartmental Transfer)
- **Investments** Finance Analyst II & III
- **Legal** Legal Analyst; Senior Staff Counsel
- **Various Divisions** Retirement Benefit Specialist III (Promotional)

ONBOARDING SOON

- **Administrative Services** Document Processing Specialist
- **Various Divisions** Sr. Retirement Benefit Specialist (Promotional); Section Head

ADDITIONS TO THE TEAM

Welcome to LACERA

- Daniel Talavera, Ashlee Kimura, Stacey Hindman, Liliana Roman, Christian Mejia** **Administrative Services**
Disability Retirement Specialist
- Rashmi Vohra** **Disability Retirement Services**
Disability Retirement Specialist
- Benjamin Juarez, Victor Tafolla** **Member Services**
Senior Retirement Benefit Specialist (Promotion)
- Tionna Fredericks, Janet Chan** **Retirement Healthcare**
Section Head (Promotion)
- Edwin Tom** **Retirement Healthcare**
Senior Retirement Benefit Specialist (Promotion)
- Rituparna Ghosh** **Systems**
IT Manager I

Kiera Vu, Caden Gilberti, Camden Richards, Noor Harwell - Investments
Lan Lao – Systems
Aidan Heieck – Information Security

Internships

FY End 2025-26 | Member Engagement, Outreach & Workforce



13,414

MEMBER SERVICE CENTER
APPOINTMENTS

14,826

WORKSHOP & BENEFIT FAIR
ATTENDEES

204,860

MEMBER SERVICES & RHC CALL
CENTER INQUIRIES

3,942

TOTAL RETIREMENTS

508

SAFETY
PLANS

3,434

GENERAL PLANS

WORKFORCE | HUMAN RESOURCES

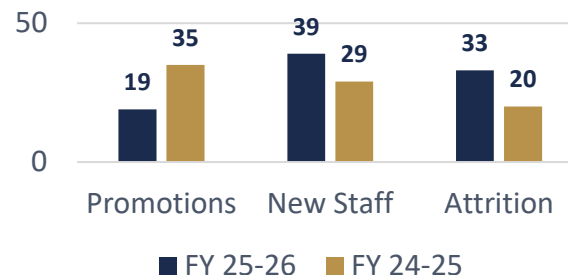
HIRING & RETENTION

Hiring Actions

58

ATTRITION RATE

6%





02

SECTION TWO

CEO Dashboard

Service metrics and operational performance

Disability Applications Snapshot

August Disability Agenda

Reporting as of July 22, 2026



KEY METRICS

Target: 12 months

16.6

AVERAGE PROCESSING
(MONTHS)

12%

Processed in 12 months or less

86

APPLICATIONS
PRESENTED TO BOARD

158

APPLICATIONS PRESENTED
TO BOARD FYTD

1

APPEALS PRESENTED TO
BOARD

1

APPEALS PRESENTED TO
BOARD FYTD

Disability Application Status

APPLICATIONS

1,063

Pending in Process

54

New Applications*

54

Received FYTD

APPEALS

52

Pending in Process

2

New Appeals

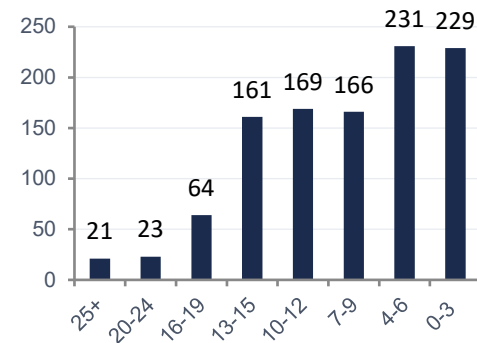
2

Received FYTD

PENDING APPLICATIONS BY MILESTONE

Intake Review	93 (9%)
Records Request	167 (16%)
File Indexing	292 (27%)
Pending Interview	164 (15%)
Drafting Report	145 (14%)
Medical Review	150 (14%)
Post Medical Review	14 (1%)
Board Prep	25 (2%)
Final Case Review	14 (1%)

PENDING APPLICATIONS BY MONTH RANGE



PENDING APPLICATION BY DEPARTMENT | TOP 3

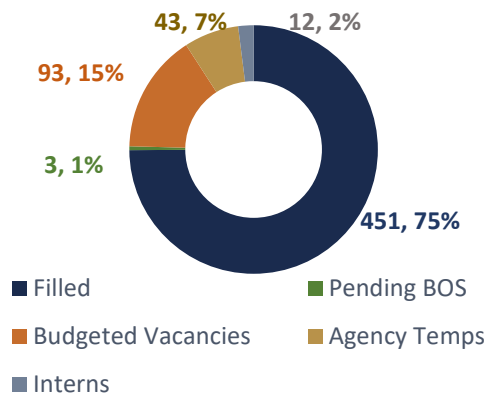
Sheriff | 462 (43%) Probation | 205 (19%)
Fire | 160 (15%)

Human Resources Snapshot

Reporting Period: June 16, 2026 – July 15, 2026



POSITIONS BREAKDOWN



VACANCY RATE

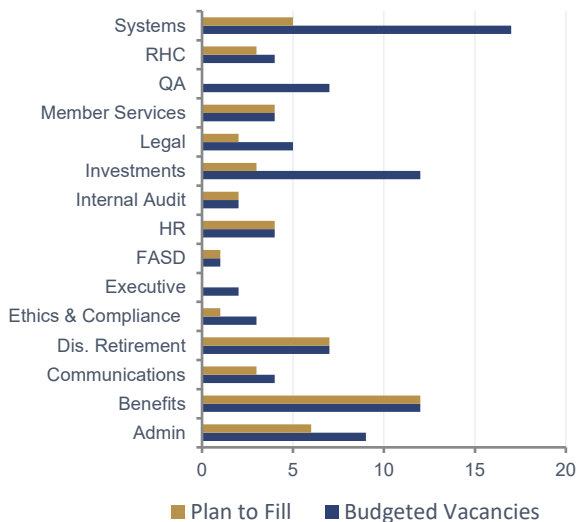
11%

PLAN TO FILL

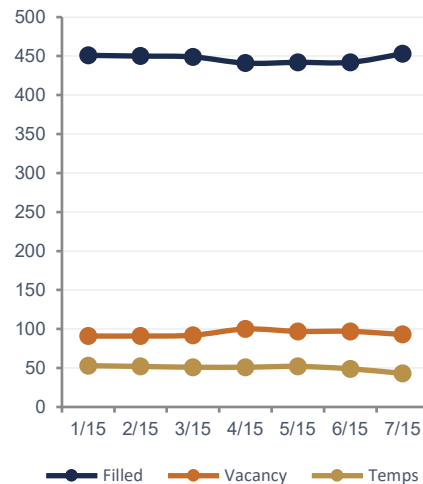
17%

ALL BUDGETED

VACANCIES BY DIVISION



MONTH-TO-MONTH



Key Financial Information

Fiscal Year End: June 30, 2025

82.0%

FUNDED RATIO

7.0%

ASSUMED RATE OF RETURN

\$86.2B

TOTAL NET ASSETS

\$99.7B

ACTUARIAL LIABILITY (AAL)

\$17.9B

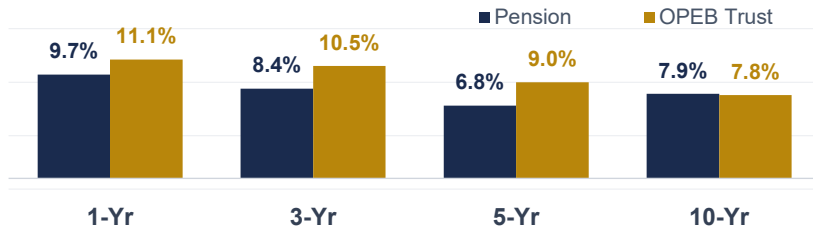
UNFUNDED LIABILITY (UAAL)

\$607M

STAR RESERVE

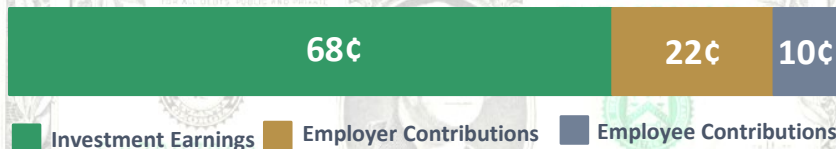
ANNUALIZED INVESTMENT RETURNS

Net of Fees



LACERA PENSION DOLLAR

WHERE EACH PENSION DOLLAR COMES FROM





Membership Snapshot

Reporting Period: As of July 16, 2026

200,765

TOTAL MEMBERSHIP COUNT

\$431.6M

MONTHLY PAYROLL

\$4.99 FYTD | 99% Direct Deposit

289

NEW RETIRED PAYEES

June 2026

MEMBERSHIP BY STATUS

	General	Safety	Total
ACTIVE	87,200	12,117	99,317
RETIRED	63,945	15,329	79,274
INACTIVE	20,590	1,584	22,174

MEDIAN GROSS MONTHLY BENEFIT

MEMBER	SURVIVOR
General Plans	General Plans
\$3,673	\$2,911
Safety Plans	MONTHLY MEDIAN (ALL PLANS)
\$10,212	\$4,404

Member Services Snapshot

Reporting Period: June 30, 2026



MS CALL CENTER

Main Queue, MyLACERA Support, HR Pro Support

8,990

Total Calls

Top Topics: Retirement Counseling, Benefit Payments, Taxes

95% Answered

5% Abandoned

Avg Speed of Answer ~1 min

Avg Duration ~16 min

Callback Queue

447 | 98% Answered

RHC CALL CENTER

Retiree Healthcare

5,103

Total Calls

Top Topics: General Benefit Inquiries, Medicare Part B, Medical/Dental Enrollments

78% Answered

22% Abandoned

Avg Speed of Answer ~15 min

Avg Duration ~14 min

Callback Queue

525 | 100% Answered

MSC APPOINTMENTS

907

Month

12,493

FYTD

In-Person 470 | Virtual 424 | Phone 13

96% MSC Satisfaction

EVENTS & WEBINARS

Events/Webinar

26

288

Month FYTD

Attendance

1,140

14,326

Month FYTD

MS Member Emails 1,100 RHC Member Emails 941

Online Services | Social Media & MyLACERA



Reporting Period: June 30, 2026

129,875

TOTAL MEMBER ACCOUNTS

65%

PERCENTAGE OF TOTAL MEMBERS

649

NEW ACCOUNTS IN JUNE

FOLLOWER COUNTS



916

(+240% YTD)



1,235

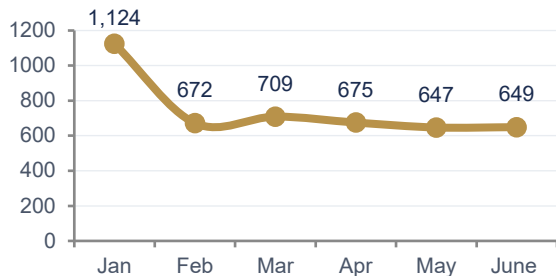
(+1,525% YTD)



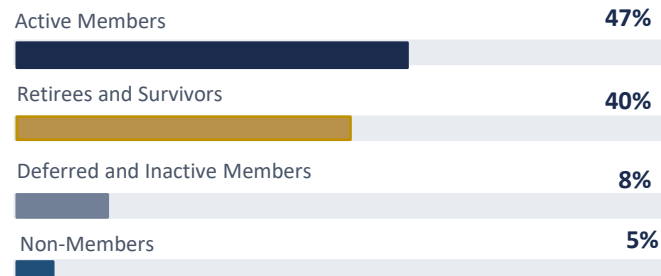
4,413

(+13% YTD)

ANNUAL NEW MYLACERA ACCOUNTS



ACCOUNTS BY MEMBER TYPE



Data as of
July 15, 2026

Retiree Healthcare

Reporting Period: June 30, 2026



RETIREE HEALTHCARE PROGRAM ENROLLMENTS

Dollars in millions | Employer Contribution, Member Contribution, and Enrollment count by benefit

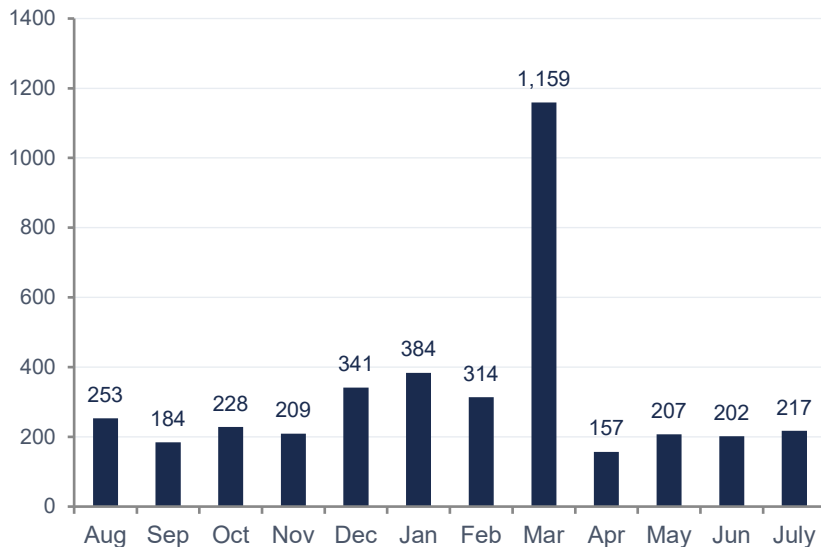
BENEFIT	EMPLOYER CONTRIBUTION	MEMBER CONTRIBUTION	ENROLLMENTS
Medical	\$697.4	\$48.9	58,446
Dental	\$51.0	\$4.5	60,944
Part B	\$105.0	—	40,760
Long Term Care	—	—	56
TOTAL	\$853.4	\$53.4	160,206

Retirements | Member Snapshot

FY 26-27 | Reporting as of July 16, 2026

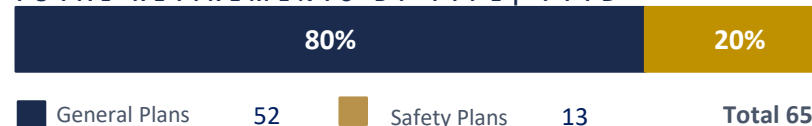


MONTHLY RETIREMENTS

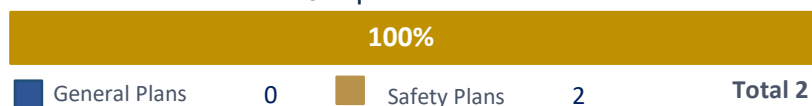


FYE 25-26 TOTAL RETIREMENTS **3,942**

TOTAL RETIREMENTS BY TYPE | FYTD



FIRE RETIREMENTS | FYTD



SHERIFF RETIREMENTS | FYTD





03

SECTION THREE

Appendix

Additional reports and supporting information

Quiet List | Overview

Guidelines governing procurement communications



WHAT IS A QUIET PERIOD?

A quiet period is a period during which LACERA is prohibited from communicating with vendors about a specific procurement, typically to avoid conflicts of interest. The period begins when LACERA releases a solicitation (RFP, RFQ, etc.) and ends when the contract is awarded. During this time, trustees and staff are not allowed to have any contact with vendors — including phone calls, emails, or in-person meetings, other within permitted exceptions.

PERMITTED EXCEPTIONS

Trustees and staff may still communicate with vendors in these specific circumstances:

1**Clarifications**

Responding in writing to authorized questions pursuant to the solicitation

2**Pre-Bid
Conference**

Pre-scheduled conferences with authorized LACERA personnel

3**Post-Award**

Contract negotiations after the award has been made

4**Existing Business**

Conducting other existing unrelated business

5**POC Studies**

Conducting Proof of Concept studies

When in doubt, err on the side of caution or contact the LACERA Legal Office.

Quiet List | Administrative & Operations

Reporting as of July 20, 2026 | *Subject to change



Solicitation	Division	Released	Stage	Respondents
Digital Communications Governance & Compliance	Legal / InfoSec	12/1/2023	Contract Development	GlobalRelay, Smarsh
External Quality Assessment of the Internal Audit Division	Internal Audit	06/26/2026	Soliciting Process	Bakertilly, Cherry Hill Advisory, McConly & Asbury, Mitchell Titus , Plante Moran, Protiviti, That Audit Guy, The IIA, UHY
Fiduciary Counsel Legal Services	Legal Office	10/30/2025	Contract Development	Reed Smith LLP
Knowledge Management Solution	Legal	10/31/2025	Vendor Selection	Eccentex , Quisitive LLC, Squirro Americas, Oxcyon Inc., Top Quadrant Inc., Work Methods Solutions Inc., Speridian Technologies LLC., Enterprise Knowledge LLC, Progress Federal Solutions, Upland RightAnswers.
Systems and InfoSec Classification and Compensation Study	Human Resources	1/26/2026	Contract Execution	CBIZ Business & Insurance Services
SAAS Provider: Drupal Hosting	Systems	8/11/2025	Contract Development	AIM Tech, Amaze.io, ATZ, Datanetiix Solutions, Dynamics Federal Technologies, Exemplifai LLC, Pantheon Systems, Inc., Smashing Infolabs Private Limited

Quiet List | Investments

Reporting as of July 20, 2026 | *Subject to change



Solicitation	Division	Released	Stage	Respondents
Real Estate Consulting Services Search	Investments	2/27/2026	Bid Review	Albourne America, LLC, Mercer Investment Consulting, Inc., NEPC Investment Consulting, LLC RCLCO Fund Advisors, LLC, StepStone Group LP, Meketa Investment Group, Inc
Passive Cash Overlay Investment Manager Search	Investments	6/13/2025	Contract Execution	Parametric Portfolio Associates

SEARCH CONTEXT

The Passive Cash Overlay Manager Search is in the Contract Execution stage. Five qualified investment firms were reviewed, each offering institutional-grade passive overlay strategies. Final selection was made and is standard LACERA vendor award protocols are being followed.

Upcoming Conferences

Trustee development & industry conferences | August – October 2026



Aug 4-6	Ai4 2026	Las Vegas, NV
Aug 16-18	NCPERS Public Pension Funding Forum	Chicago, IL
Aug 24-27	CALAPRS Pension Governance for Trustees	Santa Barbara, CA
Sept 8-9	AI in Financial Services Conference	London, UK
Sept 18	UC Irvine Audit Committee Summit	Irvine, CA
Sept 23-25	NCPERS Public Pension HR Summit	Scottsdale, AZ
Sept 24-25	Reuters MOMENTUM AI Austin	Austin, TX
Sept 30-Oct 2	CII Fall Conference	Boston, MA
Oct 2	CALAPRS Trustee Round Table	Virtual
Oct 7-8	World Summit AI	Amsterdam, NL
Oct 7-9	PREA Institutional Investor Conference	Washington, DC
Oct 11-14	NACD Directors Summit	Washington, DC
Oct 18-20	PPI Executive Seminar	Delhi, India
Oct 19-22	Gartner IT Symposium / Xpo	Orlando, FL
Oct 19-23	Investment Strategies & Portfolio Mgmt, Wharton	Philadelphia, PA
Oct 21-23	PPI Mumbai Round Table	Mumbai, India
Oct 24-25	NCPERS Fiduciary in Focus Workshop	Nashville, TN
Oct 24-25	NCPERS Accredited Fiduciary (NAF)	Nashville, TN
Oct 25-28	IFEBP Employee Benefits Conference	New Orleans, LA
Oct 25-28	NCPERS Public Safety Conference	Nashville, TN

Report of Felony Forfeiture Cases

As of July 22, 2026



CURRENT REPORTING STATUS

**Two new felony forfeiture cases added to the report for the period ending July 22, 2026.*

ABOUT FELONY FORFEITURE

Under California Public Employees' Pension Reform Act (PEPRA) § 7522.72 and § 7522.74, public employees convicted of a felony arising from the performance of official duties may forfeit accrued pension benefits from the date of conviction. LACERA monitors and reports such cases to the Board of Retirement. After LACERA decides that a forfeiture is warranted, the member has a right to appeal that decision to the Board.

FELONY FORFEITURE CASES (PENDING)

Member Name	Dept.	Conviction Date	Member Name	Dept.	Conviction Date
Mark Ridley-Thomas (Under Appeal)	BOS	3/31/2023	Joshua Saravia	Probation	1/21/2026
Joseph M. Benza	Sheriff	12/17/2024	Toni Pittmon	DCFS	2/17/2026
Eric C. Saavedra	Sheriff	1/16/2025	Tommy Trimble	Sheriff	2/17/2026
Dannie T. Kamack (Under Appeal)	Probation	3/3/2025	*Scott Schenter	Assessor	3/4/2026
Michael Meiser (Closed)	Sheriff	7/10/2025	Scott Simpkins	Sheriff	3/17/2026
Christopher Cadman	Sheriff	7/14/2025	Adrian Munoz	Medical Examiner	4/10/2026
David A. Rodriguez	Sheriff	7/14/2025	Kameko Tisdale	DCFS	4/27/2026
Michael D. Coberg (Delayed)	Sheriff	9/29/2025	Shalita Hammell	DCFS	05/19/2026
*Archam Karibian	DPSS	11/19/2025			

Public Records Requests

Information and Documents Requested under California Public Records Act
Reporting Period: June 15, 2026 – July 14, 2026

DATE	REQUESTOR	REQUEST SUMMARY
06-17	B. Campbell, with.Intelligence	Monthly performance data from LACERA investment pools for all the absolute return/hedge funds in which LACERA is currently invested for the time period of March and April 2026.
06-26	R. Renko, Individual	June 5, 2019, minutes for LACERA Board of Retirement meeting.
06-26	S. Underwood, Baylor University	Periodic holding reports that the plan maintains covering the plan's full portfolio. Include alternatives maintained in a separate schedule/report.
07-05	M. R. Toroy, with.Intelligence	Performance of all the closed-end funds including Private Equity, Venture Capital, Private Debt, Real Estate, Real Assets/Infrastructure funds LACERA invests in for Q1 2026 (or as of March 31, 2026).
07-06	T. Hettinger, LP Analyst	Recent portfolio performance data available for LACERA's private asset investments, including since-inception returns or any updated information.
07-07	Algoritmo Tools Inc.	Periodic private markets or alternative-assets performance reports, investment schedules, or equivalent data exports already maintained by LACERA that show, for each underlying fund or limited partnership in which LACERA is or was an investor. Requested period is for quarterly (fiscal quarter-end) e.g., Q4 2024, Q1 2025, Q2 2025, Q3 2025, and each subsequent quarter.
07-09	L. Chatar, SmartProcure	Any and all purchasing records from March 31, 2026, to current.
07-14	M. Xie, CEO, LA County	Report on Sheriff's retiree numbers for May 2026.

Thank *You.*

Chief Executive Officer's Report | August 2026

Los Angeles County Employees Retirement Association

Questions and discussion

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 28, 2026

TO: Trustees, Board of Retirement

FOR: Board of Retirement Meeting on August 5, 2026

SUBJECT: Ratification of Service Retirement and Survivor Benefit Application Approvals

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 AUGUST 5, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
KIMBERLY A. COLLINS	DISTRICT ATTORNEY Dept.# DA	08-12-2026	34 YR, 0 1/2 MO
ROBERT A. COMBE	L A COUNTY FIRE DEPT Dept.# FR	07-31-2026	25 YR, 3 MO
CHRISTOPHER ENCINAS	L A COUNTY FIRE DEPT Dept.# FR	09-01-2026	20 YR, 0 MO
ERIC D. EVANS	L A COUNTY FIRE DEPT Dept.# FR	08-28-2026	29 YR, 5 MO
VICTOR P. GARCIA	L A COUNTY FIRE DEPT Dept.# FR	08-29-2026	32 YR, 0 MO
WILLIAM C. HOEHNE	L A COUNTY FIRE DEPT Dept.# FR	08-31-2026	32 YR, 3 1/5 MO
DONALD H. HOLZER	L A COUNTY FIRE DEPT Dept.# FR	07-30-2026	24 YR, 5 MO
DANA MCLORN	L A COUNTY FIRE DEPT Dept.# FR	08-01-2026	22 YR, 5 MO
SHAWN W. MOTES	L A COUNTY FIRE DEPT Dept.# FR	07-31-2026	34 YR, 2 MO
MICHAEL T. RIVERA	L A COUNTY FIRE DEPT Dept.# FR	08-28-2026	31 YR, 1 MO
MICHAEL G. RYAN	L A COUNTY FIRE DEPT Dept.# FR	07-31-2026	22 YR, 6 MO
MICHAEL J. SAGELY	L A COUNTY FIRE DEPT Dept.# FR	08-31-2026	17 YR, 4 MO
DAMON C. WAFER	L A COUNTY FIRE DEPT Dept.# FR	07-10-2026	27 YR, 11 1/2 MO
GINNI J. ALVAREZ	SHERIFF Dept.# SH	06-23-2026	21 YR, 0 MO
OSCAR O. BARRAGAN	SHERIFF Dept.# SH	06-29-2026	36 YR, 4 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
IAN BECKFORD	SHERIFF Dept.# SH	06-18-2026	27 YR, 11 1/2 MO
MICHELE R. BENJAMIN	SHERIFF Dept.# SH	09-15-2026	27 YR, 11 1/2 MO
RICHARD KIGUELMAN	SHERIFF Dept.# SH	08-29-2026	29 YR, 7 MO
LAWRENCE D. LYNCH II	SHERIFF Dept.# SH	07-31-2026	14 YR, 1 MO
ENRIQUE MANDUJAN	SHERIFF Dept.# SH	07-31-2026	31 YR, 6 MO
PETER J. MARELLA	SHERIFF Dept.# SH	08-29-2026	30 YR, 8 MO
VICTOR MENDEZ	SHERIFF Dept.# SH	08-31-2026	24 YR, 0 MO
CURT A. MESSERSCHMIDT	SHERIFF Dept.# SH	08-06-2026	36 YR, 7 1/2 MO
JOHNNY C. MONTENEGRO	SHERIFF Dept.# SH	08-17-2026	31 YR, 10 MO
VICTOR J. MONTES	SHERIFF Dept.# SH	08-29-2026	25 YR, 5 MO
JEFFREY M. RABIDEAUX	SHERIFF Dept.# SH	08-22-2026	21 YR, 0 MO
ERIC M. RODRIGUEZ	SHERIFF Dept.# SH	08-29-2026	26 YR, 10 MO
JORGE ROMERO	SHERIFF Dept.# SH	07-30-2026	29 YR, 8 1/2 MO
KRISTIN M. SOISETH	SHERIFF Dept.# SH	08-31-2026	20 YR, 0 MO
GABRIEL E. VALDEZ	SHERIFF Dept.# SH	06-27-2026	26 YR, 6 1/2 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DAVID D. VIVONA	SHERIFF Dept.# SH	07-31-2026	30 YR, 1 MO
MARLON E. WILLIAMS	SHERIFF Dept.# SH	09-03-2026	27 YR, 1 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PETER G. CURTIS	AGING DEPARTMENT Dept.# AG	08-06-2026	25 YR, 0 MO
NAOMI M. FALK	ALTERNATE PUBLIC DEFENDER Dept.# AD	09-01-2026	26 YR, 3 MO
MARIO CARLO ALCARAZ	AMBULATORY CARE NETWORK Dept.# HN	06-30-2026	6 YR, 4 MO
SHERRIE C. BORZAGA	AMBULATORY CARE NETWORK Dept.# HN	07-31-2026	40 YR, 0 MO
GUADALUPE L. CARREON	AMBULATORY CARE NETWORK Dept.# HN	08-01-2026	11 YR, 2 MO
JUDY K. CHUN	AMBULATORY CARE NETWORK Dept.# HN	07-31-2026	36 YR, 6 MO
EVANGELISTA ESTORES	AMBULATORY CARE NETWORK Dept.# HN	08-29-2026	22 YR, 0 MO
TAHIR M. KHAN	AMBULATORY CARE NETWORK Dept.# HN	08-29-2026	23 YR, 0 MO
RIO P. LAWSON	AMBULATORY CARE NETWORK Dept.# HN	07-31-2026	38 YR, 10 1/2 MO
GLENDA A. LOYA	AMBULATORY CARE NETWORK Dept.# HN	06-26-2026	16 YR, 3 1/2 MO
DOMIQUA E. PATTERSON	AMBULATORY CARE NETWORK Dept.# HN	08-29-2026	15 YR, 4 MO
DIANA H. PUDER	AMBULATORY CARE NETWORK Dept.# HN	07-31-2026	22 YR, 0 MO
BARBARA A. SAUNO	AMBULATORY CARE NETWORK Dept.# HN	08-06-2026	41 YR, 0 1/2 MO
JOY STERLING	AMBULATORY CARE NETWORK Dept.# HN	07-31-2026	43 YR, 4 MO
ANGELITO C. MANUZON	ANIMAL CONTROL Dept.# AN	07-15-2026	15 YR, 11 1/2 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHAEL F. FLANCER	ASSESSOR Dept.# AS	07-31-2026	39 YR, 2 MO
OWEN B. HARRIS	ASSESSOR Dept.# AS	08-01-2026	37 YR, 5 MO
ESSAM MORCOS	ASSESSOR Dept.# AS	07-30-2026	39 YR, 10 MO
RAENETTA ROBERTS	ASSESSOR Dept.# AS	07-29-2026	41 YR, 3 MO
EVELYN TYE	ASSESSOR Dept.# AS	08-28-2026	21 YR, 3 MO
ERIC S. WADE	ASSESSOR Dept.# AS	07-31-2026	36 YR, 10 MO
ALLAN G. WHIPP	ASSESSOR Dept.# AS	07-16-2026	39 YR, 7 1/2 MO
GARY A. YAMADA	ASSESSOR Dept.# AS	07-31-2026	25 YR, 4 MO
MICHELLE M. ROMERO	AUDITOR - CONTROLLER Dept.# AU	09-08-2026	35 YR, 10 1/2 MO
ROBIN RUDE	AUDITOR - CONTROLLER Dept.# AU	08-29-2026	38 YR, 2 MO
BRYAN W. BELL	CHIEF EXECUTIVE OFFICE Dept.# AO	08-07-2026	20 YR, 1 1/2 MO
MARIA DURON	CHIEF EXECUTIVE OFFICE Dept.# AO	08-29-2026	40 YR, 9 MO
MARIA LALYRE	CHILD SUPPORT SERVICES Dept.# CD	08-15-2026	25 YR, 3 1/2 MO
MILFORD E. SIMPSON	CHILD SUPPORT SERVICES Dept.# CD	06-27-2026	24 YR, 5 MO
SHUAN YU	CHILD SUPPORT SERVICES Dept.# CD	07-31-2026	19 YR, 1 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MARKETTA F. BOWMAN	CHILDREN & FAMILY SERVICES Dept.# CH	06-30-2026	38 YR, 0 MO
DAWN L. FLEMING	CHILDREN & FAMILY SERVICES Dept.# CH	06-26-2026	31 YR, 1 MO
MONICA A. GONZALES	CHILDREN & FAMILY SERVICES Dept.# CH	07-08-2026	29 YR, 8 1/2 MO
BECKY MCCLELLAND-BUSH	CHILDREN & FAMILY SERVICES Dept.# CH	08-29-2026	31 YR, 8 MO
CHARLOTTE Y. MOORE	CHILDREN & FAMILY SERVICES Dept.# CH	08-29-2026	36 YR, 1 MO
MANUEL PEREZ	CHILDREN & FAMILY SERVICES Dept.# CH	07-31-2026	35 YR, 8 MO
SHARON R. RIDGEWAY	CHILDREN & FAMILY SERVICES Dept.# CH	08-31-2026	38 YR, 10 MO
ADELAIDA M. RODRIGUEZ	CHILDREN & FAMILY SERVICES Dept.# CH	08-29-2026	28 YR, 0 MO
THERESA MARIE TELLES ROGERS	CHILDREN & FAMILY SERVICES Dept.# CH	07-20-2026	35 YR, 11 MO
ENRIQUE A. VALDEZ	CHILDREN & FAMILY SERVICES Dept.# CH	07-31-2026	21 YR, 4 MO
DENISE B. WILLIAMS	CHILDREN & FAMILY SERVICES Dept.# CH	07-31-2026	36 YR, 11 MO
SUZI A. MAUGHAN MILES	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	06-30-2026	32 YR, 0 1/2 MO
FERLIE ANNE R. VILLACORTE	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	07-10-2026	25 YR, 3 1/2 MO
CHARITY AKANNO	CORRECTIONAL HEALTH Dept.# HC	07-30-2026	19 YR, 2 MO
VICTOR BANUELOS	CORRECTIONAL HEALTH Dept.# HC	08-26-2026	25 YR, 4 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
EUGENIA JEAN B. DE LOS SANTOS	CORRECTIONAL HEALTH Dept.# HC	06-08-2026	18 YR, 4 1/2 MO
MICHELLE R. GARCIA	CORRECTIONAL HEALTH Dept.# HC	06-24-2026	24 YR, 0 1/2 MO
ROSE M. MBONIFOR	CORRECTIONAL HEALTH Dept.# HC	08-31-2026	5 YR, 0 MO
CRISTINA M. ONG	CORRECTIONAL HEALTH Dept.# HC	07-31-2026	18 YR, 5 MO
RAUL M. VIADO	CORRECTIONAL HEALTH Dept.# HC	08-29-2026	17 YR, 10 MO
GOODNESS U. WILSON	CORRECTIONAL HEALTH Dept.# HC	07-15-2026	17 YR, 0 1/2 MO
CHRISTOPHER KEOSIAN	COUNTY COUNSEL Dept.# CC	08-29-2026	31 YR, 5 MO
LETICIA LOYA	DEPT OF HOMELESS SERV & HOUSIN Dept.# DH	08-22-2026	36 YR, 4 MO
KEITH SMITH	DEPT OF HOMELESS SERV & HOUSIN Dept.# DH	07-09-2026	25 YR, 6 1/2 MO
MARCO T. AMAYA	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	32 YR, 11 MO
LIBORIO M. ARCANA	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	32 YR, 7 MO
MARINA AVUNJIAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	29 YR, 0 MO
SOUREN AYVAZIAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	36 YR, 3 1/2 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHELLE R. BEASLEY	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	38 YR, 0 MO
JUAN C. CAMARENA	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-28-2026	25 YR, 0 MO
PATRICIA CAMPOS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	25 YR, 3 MO
ARSHALUYS CHIMAYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	25 YR, 0 MO
SALENA R. COLEMAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	06-25-2026	25 YR, 1 MO
CHERIE A. EICH	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	41 YR, 1 MO
DARIO A. FADIGA	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	28 YR, 0 MO
MONICA FELIX	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	34 YR, 1 1/2 MO
BISRAT GEBREGIORGIS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-10-2026	26 YR, 1 1/2 MO
ELIZABETH L. JIANG	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-30-2026	10 YR, 0 MO
NANCY J. KUROKI	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	06-23-2026	25 YR, 10 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANDREA D. LEWIS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	06-27-2026	35 YR, 11 MO
VICTOR LOZANO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	31 YR, 7 MO
MARY E. MANRIQUEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-28-2026	36 YR, 0 MO
ARTHUR NAVARRO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	41 YR, 1 MO
MARY ANN ROBLES	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-29-2026	32 YR, 8 MO
ANGELA D. SCULLY	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-31-2026	34 YR, 5 MO
NORMA TAMEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-24-2026	55 YR, 7 MO
JEANNETTE BERNSTEIN	DISTRICT ATTORNEY Dept.# DA	09-01-2026	45 YR, 5 MO
RON H. CAREY	DISTRICT ATTORNEY Dept.# DA	06-30-2026	18 YR, 9 MO
BJORN E. DODD	DISTRICT ATTORNEY Dept.# DA	07-31-2026	27 YR, 5 MO
GERRY W. SNELL	DISTRICT ATTORNEY Dept.# DA	06-19-2026	18 YR, 8 MO
MARY A. ARYEETAY	HEALTH SERVICES ADMINISTRATION Dept.# HS	07-31-2026	20 YR, 4 1/2 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
TRUMONA N. BENSON	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-29-2026	40 YR, 8 MO
YUNI Y. CHEN	HEALTH SERVICES ADMINISTRATION Dept.# HS	10-16-2026	27 YR, 7 1/2 MO
JACQUELINE C. LUECK	HEALTH SERVICES ADMINISTRATION Dept.# HS	06-30-2026	31 YR, 1 MO
KEVIN T. LYNCH	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-29-2026	14 YR, 0 MO
LILY K. MARTINI	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-12-2026	25 YR, 7 1/2 MO
JENNIFER K. PAPP	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-29-2026	25 YR, 5 MO
YOUNG J. PEAK	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-31-2026	19 YR, 8 MO
MARIBEL PLAZA	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-31-2026	30 YR, 2 MO
KAREN RODGERS	HEALTH SERVICES ADMINISTRATION Dept.# HS	09-12-2026	17 YR, 8 1/2 MO
HARRY Y. WONG	HEALTH SERVICES ADMINISTRATION Dept.# HS	08-28-2026	30 YR, 1 MO
LINDA ZHANG	HEALTH SERVICES ADMINISTRATION Dept.# HS	06-30-2026	19 YR, 9 MO
SAMUEL L. DAVIS	INTERNAL SERVICES Dept.# IS	06-30-2026	31 YR, 11 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
IRMA G. VAZQUEZ	INTERNAL SERVICES Dept.# IS	07-30-2026	38 YR, 2 MO
NANCY H. YANG	INTERNAL SERVICES Dept.# IS	06-30-2026	25 YR, 7 MO
MICHAEL D. PITTMAN	L A COUNTY FIRE DEPT Dept.# FR	07-16-2026	30 YR, 1 1/2 MO
FRANCISCO JARANILLA	LACERA Dept.# NL	09-30-2026	40 YR, 1 MO
MARY R. BARRAZA	MENTAL HEALTH Dept.# MH	08-01-2026	20 YR, 0 MO
HILARIE M. BAUMGARTEN	MENTAL HEALTH Dept.# MH	10-16-2026	28 YR, 9 1/2 MO
LAWRENCE S. GROSS	MENTAL HEALTH Dept.# MH	07-16-2026	13 YR, 9 MO
BICH-THUY L. TA	MENTAL HEALTH Dept.# MH	08-28-2026	28 YR, 5 MO
FANG XIE	MENTAL HEALTH Dept.# MH	09-16-2026	18 YR, 0 1/2 MO
PHILIP S. YAU	MENTAL HEALTH Dept.# MH	08-15-2026	26 YR, 4 1/2 MO
PATRICIA CARRERA- GONZALEZ	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-29-2026	26 YR, 2 MO
KARI M. COLE	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	06-30-2026	25 YR, 2 MO
FERNANDO CONRADO	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-30-2026	27 YR, 5 MO
CORAZON D. CUARESMA	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-31-2026	24 YR, 10 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
WEN DA	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	06-30-2026	17 YR, 10 1/2 MO
CHARLES L. GARZA	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-25-2026	19 YR, 0 MO
ADRIAN R. LITERAT	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	07-16-2026	18 YR, 6 1/2 MO
ANNETTE L. ROGERS	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-29-2026	32 YR, 6 13/16 MO
RICHARD RODRIGUEZ	PARKS AND RECREATION Dept.# PK	06-17-2026	17 YR, 3 MO
DAVID S. STIVES	PARKS AND RECREATION Dept.# PK	07-31-2026	25 YR, 10 MO
JOHN C. TIETJEN	PARKS AND RECREATION Dept.# PK	08-03-2026	20 YR, 0 1/2 MO
DOUGLAS WILLIAMS	PARKS AND RECREATION Dept.# PK	09-30-2026	25 YR, 0 MO
CRESCENT N. ANIEMEKA	PROBATION DEPARTMENT Dept.# PB	07-31-2026	23 YR, 2 MO
JACK J. AVERY III	PROBATION DEPARTMENT Dept.# PB	06-30-2026	18 YR, 2 MO
CHAROLEESE D. BLAND	PROBATION DEPARTMENT Dept.# PB	08-31-2026	28 YR, 4 MO
OLIVER B. CHRISTIAN	PROBATION DEPARTMENT Dept.# PB	07-15-2026	11 YR, 4 1/2 MO
TRACEY R. COLLINS	PROBATION DEPARTMENT Dept.# PB	08-07-2026	18 YR, 1 1/2 MO
CARLA R. CROWDER	PROBATION DEPARTMENT Dept.# PB	08-29-2026	28 YR, 9 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
OCTAVIA D. DAVIS	PROBATION DEPARTMENT Dept.# PB	08-29-2026	30 YR, 7 1/2 MO
AARON C. DILLARD	PROBATION DEPARTMENT Dept.# PB	06-27-2026	33 YR, 3 MO
SCOTT FAER	PROBATION DEPARTMENT Dept.# PB	07-31-2026	28 YR, 1 1/2 MO
JULIO C. GUTIERREZ	PROBATION DEPARTMENT Dept.# PB	08-29-2026	20 YR, 5 1/2 MO
KIMBERLE D. LOUDERMILK	PROBATION DEPARTMENT Dept.# PB	08-20-2026	31 YR, 7 MO
MARY LUCKETT	PROBATION DEPARTMENT Dept.# PB	07-03-2026	40 YR, 8 1/2 MO
ROSALYN E. MORRIS	PROBATION DEPARTMENT Dept.# PB	08-29-2026	26 YR, 0 MO
ANDREW U. OBIH	PROBATION DEPARTMENT Dept.# PB	08-30-2026	28 YR, 6 MO
EDWARD TREVOR PARMELEE	PROBATION DEPARTMENT Dept.# PB	08-31-2026	25 YR, 2 MO
DAVID C. RACUSIN	PROBATION DEPARTMENT Dept.# PB	07-31-2026	42 YR, 5 MO
SETH R. SHAW	PROBATION DEPARTMENT Dept.# PB	08-29-2026	35 YR, 9 MO
MICHAEL A. TAN	PROBATION DEPARTMENT Dept.# PB	07-09-2026	26 YR, 11 MO
DIANA M. TERAN	PROBATION DEPARTMENT Dept.# PB	09-08-2026	18 YR, 0 1/2 MO
JOSE M. TREJO	PROBATION DEPARTMENT Dept.# PB	08-11-2026	28 YR, 6 1/2 MO
MILITZA A. WALLACE	PROBATION DEPARTMENT Dept.# PB	07-31-2026	21 YR, 4 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHARLES WILSON	PROBATION DEPARTMENT Dept.# PB	07-31-2026	36 YR, 4 MO
ETHNA T. BURNS	PUBLIC DEFENDER Dept.# PD	08-29-2026	37 YR, 1 MO
DARYNE P. NICOLE	PUBLIC DEFENDER Dept.# PD	09-12-2026	31 YR, 9 1/2 MO
MARIA Y. SIM	PUBLIC DEFENDER Dept.# PD	08-07-2026	25 YR, 7 1/2 MO
MARIA CAMACHO	PUBLIC HEALTH PROGRAM Dept.# PH	07-31-2026	45 YR, 3 1/2 MO
KUMARI D. GOSSAI	PUBLIC HEALTH PROGRAM Dept.# PH	07-31-2026	27 YR, 5 MO
GRACE C. JIN	PUBLIC HEALTH PROGRAM Dept.# PH	08-28-2026	25 YR, 7 MO
TSEHAY B. MINAS	PUBLIC HEALTH PROGRAM Dept.# PH	06-26-2026	33 YR, 8 MO
GLENDA M. PINNEY	PUBLIC HEALTH PROGRAM Dept.# PH	07-31-2026	26 YR, 5 MO
SUZANNE M. VERREAULT	PUBLIC HEALTH PROGRAM Dept.# PH	07-18-2026	11 YR, 11 MO
JACQUELINE S. WONG	PUBLIC HEALTH PROGRAM Dept.# PH	08-23-2026	16 YR, 3 MO
ANTHONY M. GRANADOS	PUBLIC LIBRARY Dept.# PL	08-28-2026	32 YR, 2 MO
ANGEL D. NICOLAS JR	PUBLIC LIBRARY Dept.# PL	08-17-2026	21 YR, 3 MO
DAVID C. ALLISON	PUBLIC WORKS Dept.# PW	09-26-2026	28 YR, 1 MO
ERIC F. BANUELOS	PUBLIC WORKS Dept.# PW	08-28-2026	40 YR, 1 MO

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BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PATRICIO G. CO	PUBLIC WORKS Dept.# PW	08-29-2026	11 YR, 7 MO
GEORGE CRADER	PUBLIC WORKS Dept.# PW	08-29-2026	36 YR, 8 MO
GIL H. DE GUZMAN	PUBLIC WORKS Dept.# PW	09-25-2026	25 YR, 11 MO
DAVID W. FARRELL	PUBLIC WORKS Dept.# PW	07-31-2026	36 YR, 5 MO
WILLIAM P. MEEHAN	PUBLIC WORKS Dept.# PW	07-31-2026	39 YR, 6 MO
DWAYNE MEYERS	PUBLIC WORKS Dept.# PW	08-29-2026	44 YR, 5 MO
TOBY A. TAUBE	PUBLIC WORKS Dept.# PW	08-28-2026	27 YR, 11 MO
MARIA MUNOZ	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	07-25-2026	18 YR, 8 MO
OTIS RICKS	REG-RECORDER/COUNTY CLERK Dept.# RR	06-17-2026	20 YR, 6 1/2 MO
JUAN A. ACOSTA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-31-2026	10 YR, 0 MO
LIZA S. ANDAYA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-31-2026	32 YR, 10 3/4 MO
AMY P. GUIEB	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-15-2026	35 YR, 1 1/2 MO
JOSEPH A. WHITMAN	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-21-2026	35 YR, 5 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JOANN K. YORK	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	08-08-2026	32 YR, 0 MO
JUAN R. CAMACHO	SHERIFF Dept.# SH	08-29-2026	25 YR, 8 MO
IVY W. CHOU	SHERIFF Dept.# SH	08-29-2026	20 YR, 0 MO
ROSARIO A. COLEMAN	SHERIFF Dept.# SH	08-29-2026	28 YR, 3 MO
MARIA F. MAZMANIAN	SHERIFF Dept.# SH	07-16-2026	34 YR, 11 MO
KERRY R. MOORE	SHERIFF Dept.# SH	08-15-2026	20 YR, 0 MO
ISABEL S. OJEDA	SHERIFF Dept.# SH	07-07-2026	18 YR, 2 1/2 MO
ROY I. OLIVARES	SHERIFF Dept.# SH	07-31-2026	16 YR, 4 MO
SANDRA P. ONTIVEROS	SHERIFF Dept.# SH	09-26-2026	41 YR, 4 MO
ABEER A. SAID	SHERIFF Dept.# SH	08-29-2026	26 YR, 2 MO
DANIEL B. TASCIAN	SHERIFF Dept.# SH	08-31-2026	26 YR, 5 MO
MICHAEL ABRAHIM	SUPERIOR COURT/COUNTY CLERK Dept.# SC	06-18-2026	22 YR, 3 MO
FRANCISCO J. ALDANA	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-31-2026	35 YR, 2 MO
BENJAMIN CAMPOS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-05-2026	19 YR, 10 1/2 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DAVY C. CHAU	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-29-2026	25 YR, 3 MO
STEVEN L. CHEN	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-28-2026	17 YR, 2 MO
MARIA L. CLARK	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-29-2026	32 YR, 0 1/2 MO
KAREN A. COX	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-22-2026	46 YR, 0 MO
BRIDGETTE R. DIAZ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-31-2026	25 YR, 1 MO
CAROLE GALANTE	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-29-2026	23 YR, 0 MO
CAROL S. HERRERA	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-01-2026	30 YR, 0 MO
FAIMEASOO S. LILIO	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-31-2026	39 YR, 11 MO
ANGELA G. MAPP	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-28-2026	37 YR, 1 MO
HEATHER T. MAROJ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-02-2026	27 YR, 9 1/2 MO
CHERIE L. PINA	SUPERIOR COURT/COUNTY CLERK Dept.# SC	06-30-2026	36 YR, 8 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
MICHELLE RILEY	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-01-2026	45 YR, 3 MO
MARTHA A. SANCHEZ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-29-2026	38 YR, 8 MO
ELIZABETH A. SIMMONS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-10-2026	6 YR, 11 1/2 MO
AMY R. SMITH-FISHER	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-16-2026	30 YR, 11 1/2 MO
CLAUDINE L. THIBODEAUX	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-31-2026	34 YR, 2 MO
JANA TJIOOK	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-31-2026	25 YR, 4 MO
ANNA M. VALDEZ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-25-2026	33 YR, 1 MO
DEBBIE WOLLMAN	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-17-2026	32 YR, 7 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

SAFETY SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
Gloria Luna	SHERIFF Dept.# SH	05-25-2026	25 YR, 2 MO
WIFE of Robert A. Bolanos dec'd on 05-24-2026 Sect. #31781.3			
Mrs. Melody M. Gekas	SHERIFF Dept.# SH	05-02-2026	29 YR, 1 MO
WIFE of Theo K. Gekas dec'd on 05-01-2026 Sect. #31781.1			

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
Mrs. Lidia M. Hood-Sanchez	CHILDREN & FAMILY SERVICES Dept.# CH	02-07-2026	9 YR, 4 1/2 MO
WIFE of Robert J. Hood-Sanchez dec'd on 02-06-2026 Sect. #31781.3			
Breanna C. McCraw	PROBATION DEPARTMENT Dept.# PB	01-20-2019	10 YR, 5 1/2 MO
DAUGHTER of Baraka S. McCraw dec'd on 01-19-2019 Sect. #31781.3			
Gloria K. Vega	PUBLIC WORKS Dept.# PW	05-08-2025	0 YR, 9 MO
WIFE of Pierre Vega dec'd on 05-07-2025 Sect. #31781.1			

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BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JULIO C. CRUZ	SHERIFF Dept.# SH	08-31-2026	16 YR, 6 1/2 MO
MICHAEL S. HEUER	SHERIFF Dept.# SH	05-02-2026	3 YR, 0 MO
BRIAN J. KLEIBER	SHERIFF Dept.# SH	07-14-2026	1 YR, 4 MO
JOEL RODRIGUEZ	SHERIFF Dept.# SH	08-02-2026	3 YR, 0 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHERRY S. CAMAGO	AMBULATORY CARE NETWORK Dept.# HN	06-11-2026	20 YR, 6 MO
CHRISTINE S. YAN	AUDITOR - CONTROLLER Dept.# AU	07-15-2026	12 YR, 4 MO
AMPARO STUMPF	CHILD SUPPORT SERVICES Dept.# CD	06-26-2026	30 YR, 8 1/2 MO
BETTINA L. ALLEN	CHILDREN & FAMILY SERVICES Dept.# CH	07-11-2026	0 YR, 6 MO
BLANCA E. GOMEZ	CHILDREN & FAMILY SERVICES Dept.# CH	09-01-2026	11 YR, 10 MO
KARL R. HAMMOND	CHILDREN & FAMILY SERVICES Dept.# CH	09-01-2026	36 YR, 0 MO
HENRIETTA JIMENEZ	CHILDREN & FAMILY SERVICES Dept.# CH	08-22-2026	10 YR, 4 MO
PAULETTE A. SYBBLIS JONE	CHILDREN & FAMILY SERVICES Dept.# CH	07-23-2026	10 YR, 2 MO
KAREN L. LEVINE	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	07-01-2026	6 YR, 11 2/5 MO
DARCIE L. REYES	CORRECTIONAL HEALTH Dept.# HC	06-30-2026	11 YR, 0 MO
NINA L. FRANK	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	06-29-2026	13 YR, 10 MO
ROBIN GIVAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	05-04-2026	19 YR, 6 MO
NADIA MIRZAYANS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	08-01-2026	32 YR, 8 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
NORA A. MORALES	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	07-15-2026	16 YR, 4 MO
SERGIO M. GONZALEZ	DISTRICT ATTORNEY Dept.# DA	06-29-2026	10 YR, 5 1/2 MO
STEVEN J. IPSEN	DISTRICT ATTORNEY Dept.# DA	06-29-2026	24 YR, 8 MO
MARIA E. HAUBRICK	EAST L.A. MUNICIPAL COURT Dept.# 509	07-11-2026	8 YR, 2 MO
CHERYL A. BURNHAM	MENTAL HEALTH Dept.# MH	07-01-2026	21 YR, 0 MO
MARIA J. ARIAS	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	07-01-2026	11 YR, 8 MO
MAUREEN M. CLARKE	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	07-01-2026	5 YR, 7 MO
MARIANNE E. HOOPER	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	07-06-2026	15 YR, 2 1/2 MO
VIOLET MAKARDI- GHAZARIAN	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	06-30-2026	25 YR, 3 MO
REBECCA A. ORNELAS	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-12-2026	5 YR, 11 1/2 MO
NANCY E. BERMUDEZ	PROBATION DEPARTMENT Dept.# PB	06-27-2026	12 YR, 5 MO
JOHN D. GARCIA	PROBATION DEPARTMENT Dept.# PB	06-19-2026	12 YR, 10 1/2 MO
ANTOINETTE S. UNDERWOOD	PROBATION DEPARTMENT Dept.# PB	08-13-2026	11 YR, 1 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
HOLLY L. HANCOCK	PUBLIC DEFENDER Dept.# PD	06-30-2026	16 YR, 8 MO
BILLY D. LENARD	PUBLIC HEALTH PROGRAM Dept.# PH	06-11-2026	28 YR, 9 1/2 MO
DANIEL MAHER	PUBLIC HEALTH PROGRAM Dept.# PH	08-23-2026	4 YR, 9 MO
ALLEN LILUN WU	PUBLIC WORKS Dept.# PW	07-31-2026	1 YR, 2 MO
CONNIE S. WEISS	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	09-15-2026	17 YR, 1 9/16 MO
NANCY M. RATCLIFF	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-01-2026	5 YR, 9 MO
RANDALL VELEZ	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	07-05-2026	11 YR, 2 MO
GARY LAM	SHERIFF Dept.# SH	05-31-2026	7 YR, 5 MO
DULCE I. STONE	SHERIFF Dept.# SH	08-15-2026	12 YR, 10 MO
JULIE BENAVIDES	SOUTH GATE MUNICIPAL COURT Dept.# 530	07-26-2026	7 YR, 11 MO
NIMFA MOLINA	SOUTHWEST CLUSTER (MLK JR MC) Dept.# HK	06-24-2026	15 YR, 6 MO
DEBORAH L. THOMPSON	SOUTHWEST CLUSTER (MLK JR MC) Dept.# HK	07-23-2026	12 YR, 7 MO
SHERYL V. DOORNBOS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-10-2026	22 YR, 8 MO

BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANGELICA DURANT	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-02-2026	33 YR, 6 MO
MARIA GONZALES	SUPERIOR COURT/COUNTY CLERK Dept.# SC	06-10-2026	13 YR, 4 MO
YVONNE SHAW	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-04-2026	14 YR, 10 MO
PATRICIA S. THOMAS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	07-26-2026	19 YR, 0 1/2 MO

**BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

SAFETY MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
DEBORAH A. GALLEG0	SHERIFF	CHANGE OF DATE TO August 28, 2026

**BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
NORMA LOPEZ	AMBULATORY CARE NETWORK	RESCISSION OF RETIREMENT
PAUL J. SONG	ASSESSOR	CHANGE OF DATE TO August 22, 2026
LEO R. BARRERA	CHILD SUPPORT SERVICES	CHANGE OF DATE TO August 31, 2026
RODOLFO L. MOLINA	CHILD SUPPORT SERVICES	RESCISSION OF RETIREMENT
MARIANNE COTE	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO June 24, 2026
ALEJANDRA GOMEZTAGLE	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO August 29, 2026
VERA R. GRAY	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO October 01, 2026
ANA R. AMEZCUA MORENO	COASTAL CLUSTER-HARBOR/UCLA MC	CHANGE OF DATE TO September 25, 2026
NOMA M. CROOK	COASTAL CLUSTER-HARBOR/UCLA MC	CHANGE OF DATE TO August 07, 2026
TRACY DAVENPORT	COASTAL CLUSTER-HARBOR/UCLA MC	RESCISSION OF RETIREMENT
JAIME E. BAQUERO	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO September 01, 2026
BUSHRA B. HASSAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO October 02, 2026

**BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
ARMENUI PAPAZYAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO September 19, 2026
SHOGIK PETROSYAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO September 09, 2026
LEA R. MALIT-CRISOSTOMO	DISTRICT ATTORNEY	CHANGE OF DATE TO October 15, 2026
PAUL NG	HEALTH SERVICES ADMINISTRATION	RESCISSION OF RETIREMENT
AMELIA A. CANTILLO	MENTAL HEALTH	CHANGE OF DATE TO August 30, 2026
RICHARD HERNANDEZ	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT
THERESA C. SARACHO	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT
JAIME E. ALVAREZ	PROBATION DEPARTMENT	CHANGE OF DATE TO September 25, 2026
MARGARET DURAN	PROBATION DEPARTMENT	CHANGE OF DATE TO July 31, 2026
CHARLES MC DANIEL	PROBATION DEPARTMENT	CHANGE OF DATE TO July 31, 2026
STEVEN MOLLA	PROBATION DEPARTMENT	CHANGE OF DATE TO July 22, 2026
LESLIE B. RINGOLD	PUBLIC DEFENDER	CHANGE OF DATE TO September 23, 2026
DAVID R. WHITEHEAD	PUBLIC HEALTH PROGRAM	CHANGE OF DATE TO July 07, 2026

**BOARD OF RETIREMENT MEETING OF AUGUST 5, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
BRYAN QUINN	PUBLIC WORKS	RESCISSION OF RETIREMENT
HAMID R. SHALVIRI	PUBLIC WORKS	CHANGE OF DATE TO July 16, 2026
PATRICIA A. SOLTERO SANCHEZ	RANCHO LOS AMIGOS HOSPITAL	RESCISSION OF RETIREMENT
JAMES G. CURRAN	SHERIFF	CHANGE OF DATE TO September 03, 2026
LISA M. JACKSON-ROBINSON	SHERIFF	CHANGE OF DATE TO April 01, 2026
ANGELO P. TRAMONTANO	SHERIFF	CHANGE OF DATE TO August 28, 2026



July 14, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Manager 
Disability Retirement Services Division

FOR: August 5, 2026, Board of Retirement Meeting

SUBJECT: **DISMISS WITH PREJUDICE THE APPEAL OF MALAYSIA L. GANDY LOCKLIN**

Ms. Malaysia L. Gandy Locklin applied for a service-connected supplemental disability allowance on June 29, 2020. On April 5, 2023, the Board of Retirement (Board), denied her application for a service-connected supplemental disability allowance and granted a nonservice-connected supplemental disability allowance with a two-year review. Ms. Gandy Locklin filed a timely appeal.

On April 1, 2026, this application returned to the Board for a decision on the two-year review, and the Board granted the nonservice-connected supplemental disability allowance to continue.

On June 16, 2026, Ms. Gandy Locklin advised LACERA that she does not wish to proceed with the appeal.

IT IS THEREFORE RECOMMENDED THAT THE BOARD:

Dismiss with prejudice Malaysia L. Gandy Locklin's appeal for a service-connected supplemental disability allowance.

NOTED AND REVIEWED:


Francis J. Boyd, Sr. Staff Counsel

Date: 07/14/2026

TLC:mc

Attachment

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 17, 2026

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 AUGUST 5, 2026**

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:

5484B	Eric J. Gunn (Dec'd); Rosa Gunn (Surv.)	Thomas Wicke	Deny Service-Connected Survivor's Allowance
5490B	Kenneth F. Jones Jr.	In Pro Per	Deny SCD Salary Supplement - Grant NSCD Salary Supplement

TLC:kw

July 20, 2026

To: Each Trustee
Board of Retirement

From: Louis Gittens *LG*
Division Manager, Benefits

For: August 5, 2026, Board of Retirement Meeting

SUBJECT: **RATIFICATION OF RECIPROCAL DISABILITY RETIREMENTS**

RECOMMENDATION

IT IS RECOMMENDED that the Board approve the reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency.

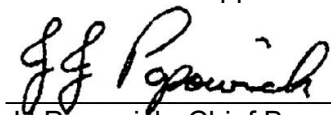
EXECUTIVE SUMMARY

The Board has the authority and responsibility to approve member retirements. In cases of reciprocal disability retirements, the Board need not make a determination regarding the member's disability as this was already determined by the reciprocal system. Under CERL Section 31837, this Board is only required to ratify the member's disability retirement from LACERA, so the member receives the corresponding benefits.

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

Reciprocal Agency	Department	Name	Safety / General Member	Disability Type	Retirement Date
CALPERS	SHERIFF/SH	CHAD V. HOEPPNER	Safety	SCD	11/7/2025
SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM	SHERIFF/SH	TRACEE WALKER	Safety	SCD	3/20/2023

Reviewed and Approved



JJ Popowich, Chief Benefits Officer

LG: am:lg

July 15, 2026

TO: Each Trustee,
Board of Retirement
Board of Investments

FROM: Steven P. Rice *SPR*
Chief Counsel

Allison E. Barrett *ASB*
Senior Staff Counsel

Jessica Rivas *JR*
Staff Counsel

FOR: August 5, 2026 Board of Retirement Meeting
August 12, 2026 Board of Investments Meeting

SUBJECT: Minor Update to LACERA's Code of Ethical Conduct

LACERA's current Code of Ethical Conduct (Code) was approved by both Boards in May 2026. The updated Code addresses many new topics that the previous Code did not, including political activity. While the Code addresses political activity in the context of local, state, and federal elections, the upcoming elections for Board of Retirement and Board of Investments Trustees raise an issue that should be addressed by way of a minor update to the Code. Due to the upcoming Trustee elections in August, we are bringing this matter directly to both Boards, instead of beginning with the Audit, Compliance, Risk and Ethics (ACRE) Committee.

Trustee elections are governed by the County Board of Supervisors ("County BOS") pursuant to County Employees Retirement Law of 1937 ("CERL"). (Government Code §§ 31520.1 and 31520.2.) Specifically, CERL gives the County authority to run the elections "in a manner determined by the board of supervisors" (*id.*), which it does through a resolution. In order to acknowledge that the County BOS' resolution may set different standards for LACERA Trustee elections than those that our Code has established for local, state, and federal elections, we recommend adding the underlined clarifying language below to page 14 of the Code:

Political Activities

We are not just public servants, but active participants in our democracy. However, we keep our political activity separate from our LACERA work. Please note that nothing in this section restricts Trustees' and staff's political activities as allowed by California law, or other legal authority, including County BOS resolutions on LACERA Trustee elections.

Re: Minor Update to LACERA's Code of Ethical Conduct
July 15, 2026
Page 2

Upon both LACERA Boards' approval, the above change will be incorporated into the Code. The updated versions of the Permissible Political Activities memoranda linked in the Code are included as attachments for your information.

Attachments

C: Luis A. Lugo
 Jonathan Grabel
 JJ Popowich
 Ted Granger
 Chaitanya Errande
 Leisha Collins
 Carly Ntoya, Ph.D.
 Cynthia Martinez
 Erika Heru
 Veronica Yi-Martinez

August 2026

TO: Each Trustee,
Board of Retirement and Board of Investments

FROM: Legal Office

SUBJECT: PERMISSIBLE POLITICAL ACTIVITIES OF LACERA OFFICERS AND EMPLOYEES

As we enter election season, please take a moment to review what political activities are and are not legally permissible. Trustees should also be mindful that other policy limitations may apply to their conduct (e.g., Code of Ethical Conduct, Media Policy, corporate governance and stewardship principles, and other policies that address who communicates on behalf of LACERA). Additionally, please note that the County Board of Supervisors may set different standards for LACERA Trustee elections and this memo is not intended to conflict with or override those standards. Please do not hesitate to reach out to the Jessica Rivas, Staff Counsel (jrivas@lacera.com) if you have any questions.

Permitted Activities

LACERA officers and employees may, *on their own time*:

- Vote;
- Express personal opinions on all political subjects, candidates, and measures;
- Participate in political activities such as rallies, caucuses, fund raisers, receptions, and dinners;
- Contribute funds to political campaigns;
- Distribute campaign literature, materials, badges, etc.;
- Wear badges or buttons, display bumper stickers on their cars, and display pictures or posters in their home or property;
- Speak publicly, or write letters or articles for or against a candidate or ballot measure; and
- Endorse or oppose a candidate or measure in political advertisements, broadcasts, campaign literature or similar material. If using official LACERA title, then indicate, "For identification purposes only."
- Solicit or receive political contributions to promote the passage or defeat of a ballot measure which would affect the pay, hours of work, retirement, civil service, or other working conditions of LACERA officers or employees. (Gov. Code § 3209).

When expressing personal opinions, speaking publicly, writing letters or articles regarding a candidate or measure, or endorsing or opposing a candidate or measure, the LACERA officer or employee must not state or imply that those views represent the views of LACERA.

Prohibited Activities

LACERA officers and employees *may not*:

- Use their official authority to impact the vote, political contributions, or campaign activities of other LACERA employees in exchange for influencing the employee's ability to obtain any position, nomination, promotion, or change in compensation or position within LACERA (Gov. Code § 3204; LACERA Code of Ethical Conduct);
- Promise to provide any person with a gift, money, promotion, job, or other form of compensation in return for a political contribution or vote (Gov. Code §§ 3204, 3205.5, Elec. Code § 18520; LACERA Code of Ethical Conduct);
- Engage in any political activities during standard and overtime work hours, unless on approved leave (Gov. Code § 3207; LACERA Code of Ethical Conduct), including distributing materials and information, attending campaign meetings, making campaign telephone calls, soliciting contributions, or performing any other campaign-related tasks;
- Engage in any political activities at LACERA's offices (300 N. Lake Ave. Pasadena, CA 91104) even when off-duty (Gov. Code § 3207; LACERA Code of Ethical Conduct);
- Place any political poster, sticker, sign or similar material on LACERA property (Gov. Code § 3207; LACERA Code of Ethical Conduct).
- Use public funds or resources for campaign activity that is not authorized by law, or to promote one side or other in an election campaign or ballot measure (Gov. Code §§ 8314, 54964; *Stanson v. Mott* (1976) 17 Cal.3d 206);
 - "Public Resources" includes, but is not limited to, land, buildings, facilities, funds, equipment, supplies, telephones, computers, vehicles, travel, and staff time.
 - Note: LACERA resources may be used to provide information regarding a ballot measure so long as the informational activity is authorized by the Constitution or laws of the State and the information is an accurate, fair, and impartial presentation of the relevant facts to aid the voters in reaching an informed decision regarding the ballot measure. LACERA resources may not be used to "take sides", advocate, or engage in campaigning. Given the difficulty in some situations to distinguish between proper informational activity and improper campaign activity, it is advisable to consult with the Legal Office in these situations.
- Include political statements in pay envelopes, including the written or printed name of any candidate; political mottos, slogans, stamps or stickers; political messages inside or on the envelope; and statements to influence the political opinions or actions of employees (Elec. Code § 18542);
- Hire a consultant to implement a strategy to support or oppose a political campaign on behalf of LACERA (88 Ops.Cal.Atty.Gen 46).
 - Note: Hiring a consultant to assist LACERA in scheduling meetings with civic leaders and possible contributors to develop a campaign to promote approval of a ballot measure is prohibited. However, hiring a consultant to reach an informed decision regarding a measure and its terms, such as conducting surveys and focus groups to assess the potential positions on a measure, gauging the public's awareness on the subject of a measure, or determining the feasibility of developing a winning measure, are permissible.

Potential Consequences

- **Civil Penalties:** Courts may impose significant civil penalties, including up to \$1,000 for each day on which the violation occurs, plus three times the value of the unlawful use of public resources. Violators may be subject to personal liability. (Gov. Code § 8314(c)).
- **Criminal Penalties:** Depending on the circumstances, a violation can be a misdemeanor or felony, with the possibility of imprisonment, significant monetary fines, or both. A conviction can also lead to disqualification from holding public office. (Pen. Code § 424).
- **Administrative Penalties:** Significant monetary sanctions may be enforced by the Fair Political Practices Commission. (Gov. Code § 83116).

August 2026

TO: All Staff

FROM: Legal Office

SUBJECT: PERMISSIBLE POLITICAL ACTIVITIES OF LACERA OFFICERS AND EMPLOYEES

As we enter election season, please take a moment to review what political activities are and are not legally permissible. Staff should also be mindful that other policy limitations may apply to their conduct (e.g., Code of Ethical Conduct, Media Policy, and other policies that address who communicates on behalf of LACERA). Additionally, please note that the County Board of Supervisors may set different standards for LACERA Trustee elections and this memo is not intended to conflict with or override those standards. Please do not hesitate to reach out to the Jessica Rivas, Staff Counsel (jrivas@lacera.com) if you have any questions.

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- Speak publicly, or write letters or articles for or against a candidate or ballot measure; and
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- Promise to provide any person with a gift, money, promotion, job, or other form of compensation in return for a political contribution or vote (Gov. Code §§ 3204, 3205.5, Elec. Code § 18520; LACERA Code of Ethical Conduct);
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 - "Public Resources" includes, but is not limited to, land, buildings, facilities, funds, equipment, supplies, telephones, computers, vehicles, travel, and staff time.
 - Note: LACERA resources may be used to provide information regarding a ballot measure so long as the informational activity is authorized by the Constitution or laws of the State and the information is an accurate, fair, and impartial presentation of the relevant facts to aid the voters in reaching an informed decision regarding the ballot measure. LACERA resources may not be used to "take sides", advocate, or engage in campaigning. Given the difficulty in some situations to distinguish between proper informational activity and improper campaign activity, it is advisable to consult with the Legal Office in these situations.
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- Hire a consultant to implement a strategy to support or oppose a political campaign on behalf of LACERA (88 Ops.Cal.Atty.Gen 46).
 - Note: Hiring a consultant to assist LACERA in scheduling meetings with civic leaders and possible contributors to develop a campaign to promote approval of a ballot measure is prohibited. However, hiring a consultant to reach an informed decision regarding a measure and its terms, such as conducting surveys and focus groups to assess the potential positions on a measure, gauging the public's awareness on the subject of a measure, or determining the feasibility of developing a winning measure, are permissible.

Potential Consequences

- **Civil Penalties:** Courts may impose significant civil penalties, including up to \$1,000 for each day on which the violation occurs, plus three times the value of the unlawful use of public resources. Violators may be subject to personal liability. (Gov. Code § 8314(c)).
- **Criminal Penalties:** Depending on the circumstances, a violation can be a misdemeanor or felony, with the possibility of imprisonment, significant monetary fines, or both. A conviction can also lead to disqualification from holding public office. (Pen. Code § 424).
- **Administrative Penalties:** Significant monetary sanctions may be enforced by the Fair Political Practices Commission. (Gov. Code § 83116).
- **LACERA Disciplinary Action:** Any staff member who engages in any of the prohibited activities outlined in this memorandum may be subject to discipline, up to and including, discharge.

July 7, 2026

TO: Trustees – Board of Retirement

FROM: Jean J. Kim 
Senior Staff Counsel

DATE: Board of Retirement Meeting of August 5, 2026

SUBJECT: **PENSIONABILITY ANALYSIS UNDER CERL AND PEPRA FOR NEW PAY ITEMS**

INTRODUCTION

This memorandum addresses three new pay items for which the County of Los Angeles (the “County”) has requested a pensionability determination.

Based on our review, as set forth below, we recommend the following pensionability determination for the pay items at issue:

1. Court Interpreter One-Time Longevity Bonus (A and C-status) (Item No. TBD)

Recommendation:

Include in compensation earnable for legacy members.
Exclude from pensionable compensation for PEPRA members.

2. Court Interpreter One-Time Longevity Bonus (F-status) (Item No. TBD)

Recommendation:

Include in compensation earnable for legacy members.
Exclude from pensionable compensation for PEPRA members.

3. Straight Overtime Pay – Manual (Item No. 723)

Recommendation:

Exclude from compensation earnable for legacy members.
Exclude from pensionable compensation for PEPRA members.

A summary of the new pay codes is attached as Attachment A.

BOARD AUTHORITY TO MAKE PENSIONABILITY DETERMINATIONS

The Board of Retirement (the “Board”) is charged with determining whether a pay item qualifies as pensionable under the County Employees Retirement Law of 1937 (“CERL”) and the California Public Employees’ Pension Reform Act of 2013 (“PEPRA”) and is therefore includable as final compensation in calculating a member’s retirement benefit. Cal. Govt. Code §31461(a)(1) and §7522.34.

Items of compensation are analyzed as pensionable:

- for legacy members under the definition of “compensation earnable” in Cal. Govt. Code §31461; and
- for PEPRA members under the definition of “pensionable compensation” in Cal. Govt. Code §7522.34

A “legacy member” refers to any individual who became a member of LACERA, or a reciprocal system, prior to January 1, 2013. A “PEPRA member” refers to anyone who first became a member of LACERA on or after January 1, 2013, and was not previously a member of another public retirement system prior to that date. Cal. Govt. Code §7522.04(f).

COMPENSATION EARNABLE FOR LEGACY MEMBERS

In order for a pay item to be includable in a legacy member’s retirement benefit, it must qualify (i) as “compensation” as defined in Cal. Govt. Code §31460 and (ii) as “compensation earnable” under Cal. Govt. Code §31461. “Compensation” is generally defined as remuneration paid in cash to a member. Cal. Govt. Code §31460. “Compensation earnable” is defined as the average compensation based on “the average number of days ordinarily worked by persons in the same grade or class of positions during the period and at the same rate of pay” that it is not expressly excluded from “compensation earnable” pursuant to Cal. Govt. Code §31461(b). Cal. Govt. Code §31461.

Types of pay that are expressly excluded from compensation earnable include:

- One-time or ad hoc payments not paid to all similarly situated members in the member’s grade or class (Cal. Govt. Code §31461(b)(1)(B));
- Payments for unused leave or compensatory time off in excess of the amount of leave or compensatory time off that is earned and payable in each 12-month period during the final compensation period (Cal. Govt. Code §31461(b)(2));
- Payments for additional services rendered outside of normal working hours (Cal. Govt. Code §31461(b)(3)); and
- Payments made at the termination of employment in excess of what is earned and payable in each 12-month period during the final compensation period (Cal. Govt. Code §31461(b)(4)).

PENSIONABLE COMPENSATION FOR PEPRA MEMBERS

In order for a pay item to be includable in a PEPRA member's retirement benefit, the pay item must constitute "pensionable compensation" as defined under Cal. Govt. Code §7522.34. Pensionable compensation is generally defined as "the normal monthly rate of pay or base pay" of the member that is paid to "similarly situated members of the same group or class of employment for services rendered on a full-time basis during normal working hours, pursuant to publicly available pay schedules." Cal. Govt. Code §7522.34(a). In addition, the pay item must not fall within one of the thirteen enumerated exclusions from pensionable compensation, set forth under Cal. Govt. Code §7522.34(c).

Notable examples of pay that are expressly excluded from pensionable compensation include:

- One-time or ad hoc payments (Cal. Govt. Code §7522.34(c)(3));
- Payments for unused vacation, annual leave, personal leave, sick leave, or compensatory time off (Cal. Govt. Code §7522.34(c)(5));
- Payments for additional services rendered outside of normal working hours (Cal. Govt. Code §7522.34(c)(6));
- Employer-provided allowance, reimbursement, or payment for items such as housing, vehicle, or uniforms (Cal. Govt. Code §7522.34(c)(7));
- Compensation for overtime work (Cal. Govt. Code §7522.34(c)(8)); and
- Bonuses paid in addition to a member's base pay or normal monthly rate of pay (Cal. Govt. Code §7522.34(c)(10)).

LEGAL ANALYSIS OF NEW PAY ITEMS

1. Court Interpreter One-Time Longevity Bonus (A and C-status) (Item No. TBD)

This pay item provides a one-time longevity bonus to Court Interpreters in Bargaining Unit 868, who are employed on a monthly permanent basis (A-status, Item No. 9887) or a daily as-needed basis (C-status, Item No. 9920). The amount of the payment is based on the employee's years of service with the Court as of April 22, 2026.

For legacy members, this pay item qualifies as compensation earnable because (i) it is remuneration paid to eligible employees and therefore qualifies as "compensation" as defined in Cal. Govt. Code §31460, (ii) it is part of the average compensation that will be paid to all eligible employees and therefore, meets the definition for compensation earnable under Cal. Govt. Code § 31461(a)(1), and (iii) although it is a one-time payment, it is made available to all similarly situated members in the applicable class and is therefore not excluded under Cal. Govt. Code § 31461(b)(1)(B).

For PEPRA members, this pay item is excluded from pensionable compensation because it is a one-time payment and it is a bonus paid in addition to the member's

normal monthly rate of pay or base pay. It is therefore excluded from pensionable compensation under Cal. Govt. Code § 7522.34(c)(3) and (c)(10).

Recommendation:

Include in compensation earnable for legacy members.

Exclude from pensionable compensation for PEPRA members.

2. Court Interpreter One-Time Longevity Bonus (F-status) (Item No. TBD)

This pay item provides a one-time longevity bonus to Hourly As-Needed Court Interpreters (F-status, Item No. 9555) in Bargaining Unit 868. The amount of the payment is based on the employee's years of service with the Court as of April 22, 2026. To qualify, the employee must have worked at least eight hours during the six-month period preceding ratification of the Memorandum of Understanding.

For legacy members, this pay item qualifies as compensation earnable because (i) it is remuneration paid to eligible employees and therefore qualifies as "compensation" as defined in Cal. Govt. Code §31460, (ii) it is part of the average compensation that will be paid to all eligible employees and therefore, meets the definition for compensation earnable under Cal. Govt. Code § 31461(a)(1), and (iii) although it is a one-time payment, it is paid to all similarly situated members in the applicable class, all members of Bargaining Unit 868 who have met the minimum hours worked requirement, and is therefore not excluded under Cal. Govt. Code §31461(b)(1)(B). The fact that eligibility for the bonus is restricted to those who have worked a minimum number of hours in the immediately preceding six-month period, suggests that the bonus was meant to be provided to the entire classification (all F-status members in Bargaining Unit 868) so long as the member had worked more than a de minimis amount.

For PEPRA members, this pay item is excluded from qualifying as pensionable compensation because it is a one-time payment and it is a bonus paid in addition to the member's normal monthly rate of pay or base pay. It is therefore excluded from pensionable compensation under Cal. Govt. Code § 7522.34(c)(3) and (c)(10).

Recommendation:

Include in compensation earnable for legacy members.

Exclude from pensionable compensation for PEPRA members.

3. Straight Overtime Pay – Manual (Item No. 723)

This pay item is being created to comply with the tax reporting requirements of the One, Big, Beautiful Bill Act, which requires compensation for overtime hours worked that is paid in accordance with the Fair Labor Standards Act to be reported on

Form W-2. County departments will use this pay item to process manual corrections or payments for straight overtime as needed, to ensure correct reporting on Form W-2.

For legacy members, this pay item is excluded from qualifying as compensation earnable because it is compensation for additional services rendered outside of normal working hours. It is therefore excluded from compensation earnable under Cal. Govt. Code § 31461(b)(3).

For PEPRAs members, this pay item is excluded from qualifying as pensionable compensation because it is compensation for additional services rendered outside of normal working hours and specifically, it is compensation for overtime work. It is therefore excluded from pensionable compensation under Cal. Govt. Code §7522.34(c)(6) and (c)(8).

Recommendation:

Exclude from compensation earnable for legacy members.

Exclude from pensionable compensation for PEPRAs members.

CONCLUSION

Based on the analysis provided above and on Attachment A, it is therefore recommended that the Board:

1. Approve the recommendations set forth above as to the three new pay items.
2. Instruct staff to coordinate with the Auditor-Controller to establish the necessary reporting mechanisms and procedures to permit LACERA to implement such determinations when calculating final compensation for legacy and PEPRAs members.

For reference, the complete lists of pay codes that the Board has determined to be pensionable or not pensionable under CERL and under PEPRAs are located at <https://www.lacera.com/active-service/cerl-pay-codes> (for legacy members) and <https://www.lacera.com/active-service/pepra-pay-codes> (for PEPRAs members).

Reviewed and Approved



Steven P. Rice
Chief Counsel

JJK/et
Attachment

Attachment: Newly Created Pay Codes reviewed under Sections 31461 (CERL/Legacy) and 7522.34 (PEPRA)					
Pay Event Code	Pay Event Title	Pay Event Description	31461 (CERL/Legacy) Reference	7522.34 (PEPRA) Reference	Analysis
Newly Created and INCLUDED under Section 31461 and EXCLUDED under 7522.34					
TBD	COURT INTERPRETER ONE-TIME LONGEVITY BONUS (A AND C-STATUS)	This pay event is being created to pay Court Interpreters in Bargaining Unit 868 a one-time payment based on their first contact date with the Court and corresponding years of service as of the date of ratification (4/22/2026) of the Memorandum of Understanding. The eligible classifications and bonus amounts are as follows: <u>Eligible Classifications</u> Interpreter – Regular, SC, Item No. 9887 (A-status) Interpreter – Daily, SC, Item No. 9920 (C-status) <u>Bonus Amounts</u> \$1,200 one-time payment for unit members with 10 years or less of service \$2,400 one-time payment for unit members with 11 to 20 years of service \$3,600 one-time payment for unit members with 21 or more years of service "A" status Interpreters work full-time and are regularly scheduled to work five days per week. "C" status Interpreters work part-time during morning or afternoon shifts five days per week.	(a)(1)	(c)(3) (c)(10)	This compensation is a one-time payment that is made to all similarly situated members in the member’s grade or class. The bonus structure is tiered according to experience level. Interpreters employed under classifications 9887A and 9920C with similar experience (using the first contact date with the Court as the starting point) to other members holding the same job classification are eligible for the same payment amount. The recommendation is to INCLUDE this payment in compensation earnable for legacy members. This compensation constitutes a one-time payment under §7522.34(c)(3) and a bonus paid in addition to the normal monthly rate of pay or base pay under (c)(10). It is a form of compensation that is inconsistent with the requirements of pensionable compensation under §7522.34(a). The recommendation is to EXCLUDE this payment from pensionable compensation for PEPRA members.
TBD	COURT INTERPRETER ONE-TIME LONGEVITY BONUS (F-STATUS)	This pay event is being created to pay Hourly As-Needed Court Interpreters (Item No. 9555, F-status) in Bargaining Unit 868 a one-time payment based on their first contact date with the Court and corresponding years of service as of the date of ratification (4/22/2026) of the Memorandum of Understanding (MOU). “F” status Interpreters work on an hourly as-needed basis and are placed on a "call as-needed" list for daily assignments. To be eligible for the payment, the Interpreter must have worked at least 8 total hours over the last 6 months preceding the date of ratification of the MOU. The bonus amounts are as follows: <u>Bonus Amounts</u> \$600 one-time payment for unit members with 10 years or less of service \$1,200 one-time payment for unit members with 11 to 20 years of service \$1,800 one-time payment for unit members with 21 or more years of service	(a)(1)	(c)(3) (c)(10)	This compensation is a one-time payment that is made to Court Interpreters (Item No. 9555F) employed on an hourly as-needed basis who worked at least 8 total hours over the 6-month period preceding the MOU ratification date. The bonus structure is tiered according to experience level. Interpreters employed under classification 9555F with similar experience (using the first contact date with the Court as the starting point) are eligible for the same payment amount. This payment qualifies as compensation earnable under §31461(a)(1) because it is part of the average compensation paid to all eligible employees at the same rate based on experience. Limiting bonus eligibility to employees who worked a modest number of hours during the prior 6 months suggests that the bonus was intended for the entire classification—all F-status Court Interpreters in Bargaining Unit 868—who rendered a minimum amount of services to the Court. The recommendation is to INCLUDE this payment in compensation earnable for legacy members. This compensation constitutes a one-time payment under §7522.34(c)(3) and a bonus paid in addition to the normal monthly rate of pay or base pay under (c)(10). It is a form of compensation that is inconsistent with the requirements of pensionable compensation under §7522.34(a). The recommendation is to EXCLUDE this payment from pensionable compensation for PEPRA members.

Attachment: Newly Created Pay Codes					
reviewed under Sections 31461 (CERL/Legacy) and 7522.34 (PEPRA)					
Pay Event Code	Pay Event Title	Pay Event Description	31461 (CERL/Legacy) Reference	7522.34 (PEPRA) Reference	Analysis
Newly Created and EXCLUDED under Sections 31461 and 7522.34					
723	STRAIGHT OVERTIME - MANUAL	This pay event is being created to comply with the tax reporting requirements of the One, Big, Beautiful Bill Act. For tax years 2026-2028, the County must report the "FLSA-qualified premium overtime" compensation on the Form W-2. County departments will use this new event code to make manual corrections/payments for straight overtime, if needed, to ensure correct reporting on the Form W-2.	(b)(3)	(c)(6) (c)(8)	This compensation constitutes a payment for additional services rendered outside of normal working hours under §31461(b)(3). The recommendation is to exclude this payment from compensation earnable for legacy members. Payments made to a member for additional services rendered outside of normal working hours are excluded from pensionable compensation under §7522.34(c)(6). Compensation for overtime work is excluded from pensionable compensation under §7522.34(c)(8). The recommendation is to exclude this payment from pensionable compensation for PEPRA members.



July 6, 2026

TO: Each Trustee,
Board of Retirement

FROM: Eugenia W. Der
Senior Staff Counsel, Strategic Objective 2.2 Project Lead

David Choe
Project Manager, Systems Project Management Office

FOR: August 5, 2026, Board of Retirement Meeting

Subject: **Vendor Recommendation – Knowledge Management System**

RECOMMENDATION

That the Board of Retirement authorize staff to engage with Oxcyon, Inc. to provide an enterprise-wide knowledge management system¹ to digitally capture, document, organize, and access critical business knowledge and information. The first-year cost is \$451,750 (which includes implementation, licensing, and cloud hosting). The total anticipated cost over three years is \$992,750. This solution is budgeted under the Systems Division for Fiscal Year 2026-2027 for \$500,000.

EXECUTIVE SUMMARY

In July 2023, the Board of Retirement adopted the Five-Year Strategic Plan, which includes the implementation of a knowledge management system for the entire organization as part of Strategic Priority 2: Innovation through Technology. LACERA houses a voluminous amount of explicit and implicit knowledge that is vital to our operations. While LACERA has a variety of databases that house divisional and interdivisional information, it does not have a centralized knowledge management system in place to obtain, organize, and manage critical business information. As a result, users must search for information in a variety of locations and important implicit knowledge can be lost as long-time employees retire.

The Taxonomy and Knowledge Management Project including a taxonomy consultant was approved by the Information Technology Coordination Council on March 19, 2024.

¹ A knowledge management system (KMS) is a centralized digital platform used to capture, organize, and share an organization's information and expertise.

On June 5, 2024, the Operations Oversight Committee authorized staff to issue a Request for Proposal for consulting services to review LACERA's knowledge assets², develop a taxonomy for the future knowledge management system, develop requirements for the knowledge management system, and assist with the Request for Proposal (RFP) for the actual knowledge management system including reviewing RFP proposals and selection of the vendor solution, amongst other services.

After an extensive search, in March 2025, LACERA contracted with Taxonomy Strategies (TS) for the above consulting services. A project kick-off meeting was held on March 13, 2025, between TS and LACERA's core knowledge management system (KMS) project team. The following LACERA staff are part of the KMS core team:

- JJ Popowich, Executive Sponsor
- Eugenia Der, Project Lead
- David Choe, Project Manager
- Paola Johns, Project Assistant
- Alex Ochoa, Project Subject Matter Expert

At the kick-off meeting, a project timeline, spanning approximately one year, was introduced along with various phases of the project all with the ultimate goal of preparing LACERA for a knowledge management system and obtaining a knowledge management vendor. Strategically, TS and the KMS core team decided to start with the five Member Operations Group (MOG) divisions for this project: Member Services, Benefits, Quality Assurance, Disability Retirement Services, Communications, and included Retiree Healthcare since they provide critical service directly to members.

Over the past year, TS reviewed and content tagged over 3,500 knowledge assets from the MOG divisions, Retire Healthcare, and Compass Library, met multiple times with subject matter experts (SMEs) from these divisions, and created a uniform taxonomy to be used for our new knowledge management system.

After reviewing and assessing the various needs of LACERA's business units, TS developed 245 functional requirements for the knowledge management system spanning the following categories: asset creation, storage and management, taxonomy management, and end-user application. LACERA's Systems Division provided 41 technical requirements.

Armed with these functional and technical requirements, LACERA published the RFP on October 31, 2025, with the following timeline:

² Knowledge assets are the accumulated intellectual resources of an organization such as data, expertise, processes, and intellectual property.

Event Description	Date
RFP Release Date	October 31, 2025
Intent to Respond Closing Date	November 14, 2025
Written Questions from Respondents Due Date	November 21, 2025
LACERA's Response to Respondent's Questions	December 12, 2025
RFP Due Date	December 19, 2025
Finalist Interviews (estimate)	Q1 2026
Selection Notification (estimate)	Q2 2026
Commencement of Work	Upon Contract Execution

LACERA received 10 RFP proposals by the RFP deadline from the following companies:

- Eccentex
- Enterprise Knowledge
- Oxcyon, Inc.
- Progress Semaphore
- Quisitive
- Speridian Technologies
- Squirro
- Top Quadrant
- Upland Software
- WorkMethods Solutions, Inc.

The price submitted in these proposals for the first year's cost including implementation ranged from \$448,400 to \$1,528,000.

All 10 RFPs were reviewed and scored based on the following criteria:

	CRITERIA	WEIGHT
1	Experience with developing knowledge management solutions for large organizations (includes evaluation of 245 functional requirements and 41 technical requirements)	40%
2	Organization and team/project lead experience	20%
3	Client Services	10%
4	Availability	10%
5	Project Management Approach	10%
6	Reasonableness of fees	10%

Additionally, each vendor was required to review all 245 functional requirements and 41 technical requirements and explain whether they could meet, partially meet, or were unable to meet each requirement. These answers were factored into Criteria 1.

For every criterion, each vendor was awarded points based on the following scale:

- 3 points – fully meets
- 2 points – meets with minor gaps
- 1 point – partially meets
- 0 points – does not meet

The points were then averaged together using the same rating scale with the highest possible overall score being 3.00. The rating team consisted of the following:

- JJ Popowich, Executive Sponsor
- Eugenia Der, Project Lead
- David Choe, Project Manager
- Alex Ochoa, Project Subject Matter Expert
- Bryan Durant, Subject Matter Expert
- Taxonomy Strategies, Consultant

After thorough review and scoring of each RFP, only vendors who received at least an overall score of 2.00 were invited to demo their product. These were the following vendors and their respective RFP proposal scores:

VENDOR	SCORE
Oxcyon, Inc.	2.44
Eccentex	2.39
Speridian Technologies	2.37
WorkMethods Solutions, Inc.	2.29
Quisitive	2.16
Enterprise Knowledge	2.00

Each vendor was provided access to a secured SharePoint site specifically created for the vendor demos consisting of approximately 500 LACERA knowledge assets and a demo script consisting of a pared down version of the functional and technical requirements.

Division managers and various members of their teams were invited to view the vendor demos and provide feedback to the raters. The demos were rated on how well they were able to illustrate fulfillment of the functional and technical requirements per the demo script again based on a 0 – 3 rating scale of “does not meet” to “fully meets.”

The vendors scored as follows on the demonstrations:

VENDOR	SCORE
Oxcyon, Inc.	2.32
Speridian Technologies	1.65
Enterprise Knowledge	1.63

WorkMethods Solutions, Inc.	1.55
Quisitive	1.37
Eccentex	1.16

Oxcyon's product, Centralpoint Knowledge Management platform, outperformed all the other systems as illustrated by its score by fulfilling more requirements than any other system as highlighted below.

Product Highlights

Oxcyon, Inc.'s (Oxcyon) system, Centralpoint, is a modular enterprise knowledge management platform designed to manage the full lifecycle of knowledge assets from creation, indexing and classification through governance, search, and secure delivery.

Centralpoint offers a multitude of robust capabilities that are user-friendly and visually pleasing. These capabilities include, but are not limited to:

- Customizable, configurable, and visually friendly dashboards that can show a variety of tasks and information about knowledge assets.
- Security controls that can manage access control groups down to the user for each knowledge asset.
- Creation and management of workflows.
- Identifying and consolidating duplicate records.
- Management of a knowledge asset's taxonomy and metadata.
- Automatic assignment of a knowledge asset to the taxonomy that LACERA created and provided.
- Indexing all the words in the knowledge asset.
- Multiple search capabilities including federated searches across databases, filtered searches, natural language search, and browse search.
- Tracking and managing a knowledge asset's version history.
- Providing comments on a knowledge asset and managing the comment thread.
- Viewing comment history on knowledge assets.
- Knowledge assets can be ingested into Centralpoint or left in SharePoint with full indexing capabilities in both scenarios.
- Can modify the universal taxonomy within Centralpoint.
- Can be a multi-tenant solution.
- Can create universal governance rules, e.g.) redaction rule that removes social security numbers from view off a document.
- Creation of templates and forms.
- Has a Centralpoint plug-in for Word that allows access to all references and cross-references in any datasets while working in Word.
- Integration with LACERA's active directory.

While the KMS core team was impressed with Centralpoint's demonstrated features, we performed additional due diligence. Reference check requests were sent to Bruno Independent Living Aids, Ontologex (consultant for Cook County Pension Fund), and the United States House Permanent Select Committee on Intelligence (HPSCI). We received positive feedback from Bruno Independent Living Aids and Ontologex regarding excellent customer service, product usability, adherence to project budget, and overall satisfaction. Both organizations are still using Centralpoint. (Unfortunately, the HPSCI did not respond to our request for a reference check.)

Furthermore, the KMS core team met with key members of LACERA's Systems Division and Information Security Office to discuss any technical issues and security concerns related to Oxcyon and the Centralpoint platform. At our request, Oxcyon provided additional security and risk management protocols for our review. A subsequent meeting was held on June 1, 2026, between Oxcyon's technical team and key members from the Systems Division and the Information Security Office to address any remaining questions and concerns. After a positive meeting, the KMS core team received approval from Systems and the Information Security Office to move forward in this process with Oxcyon.

Oxcyon, Inc. Company Profile

Oxcyon is a privately held U.S.-based technology company founded in 2000 and headquartered in Fairlawn, Ohio. The company specializes in the design, implementation, and long-term support of enterprise digital platforms for government agencies, utilities, healthcare organizations, and other highly regulated environments. With more than two decades of experience and approximately 142 full-time employees, Oxcyon has built a strong reputation for delivering scalable, secure, and compliant knowledge management solutions. Its flagship platform, Centralpoint, is a Gartner-recognized Digital Experience Platform (DXP) used by over 350 organizations nationwide to manage knowledge, documents, policies, and enterprise content within a governed, auditable environment.

The company emphasizes security, compliance, and long-term scalability, supported by continuous bi-weekly platform enhancements and a fully U.S.-based delivery team. This approach enables Oxcyon to serve as a trusted partner to public-sector and regulated organizations seeking to modernize how institutional knowledge is captured, governed, and accessed.

Proposed Phases & Implementation Tasks

Oxcyon proposes a four-phased approach for implementation:

Phase 1 – Kickoff & Discovery:

- Project kickoff meeting
- Stakeholder interviews and requirements validation
- Knowledge inventory and source system review

- Security, access, and governance planning
- Initial UI and portal design alignment

Phase 2 – Configuration & Build:

- Taxonomy and metadata configuration
- Role-based access control and workflows
- Ingestion and indexing rule set-up
- Search, analytics, and dashboard configuration
- UI branding and portal layout development

Phase 3 – Testing and Validation:

- Content ingestion and validation
- Workflow and security testing
- User acceptance testing
- Refinements based on feedback
- Training delivery and documentation review

Phase 4 – Launch & Transition:

- Production deployment
- Final data synchronization
- Go-live support
- Post-launch monitoring and stabilization
- Transition to ongoing support and client success management

The actual timeline for the four phases will be developed and adjusted based on LACERA's resource availability and in consultation with our subject matter experts. After successful implementation is achieved with the five MOG divisions, Retiree Healthcare, and Compass Library, the KMS core team will begin implementing the knowledge management solution with other LACERA divisions.

IT IS THEREFORE RECOMMENDED THAT THE BOARD OF RETIREMENT authorize staff to engage with Oxcyon, Inc. to provide an enterprise-wide knowledge management system to digitally capture, document, organize, and access critical business knowledge and information at a first-year cost of \$451,750 (which includes implementation, licensing, and cloud hosting). The total anticipated cost over three years is \$992,750. This solution is budgeted under the Systems Division for Fiscal Year 2026-2027 for \$500,000.

Review and approved



JJ Popowich

Assistant Executive Officer

c: Luis Lugo
 Ricki Contreras
 Kathy Delino
 Joe Shiuan
 David Choe
 Chaitanya Errande
 Steven Rice

Knowledge Management System

Vendor Recommendation to the Board of Retirement

Oxcyon, Inc. — Centralpoint | August 5, 2026

Recommendation and Overview



Recommendation

That the Board of Retirement authorize staff to engage with Oxcyon, Inc. to provide an enterprise-wide knowledge management system to digitally capture, document, organize, and access critical business knowledge and information. The first-year cost is \$451,750 (which includes implementation, licensing, and cloud hosting). The total anticipated cost over three years is \$992,750. This solution is budgeted under the Systems Division for Fiscal Year 2026-2027 for \$500,000.

Overview (Key Benefits)

- **Strategic Plan:** LACERA's 2023 Five-Year Strategic Plan calls for an enterprise-wide knowledge management system under Strategic Priority 2: Innovation through Technology.
- **Centralized Knowledge Platform:** The organization holds vast explicit and implicit knowledge vital to operations, but no centralized way to capture and manage it. Staff search across many disconnected databases, and institutional knowledge can be lost as long-tenured employees retire. A central platform preserves institutional knowledge and makes it findable across every division.
- **Full Knowledge Asset Life Cycle Management:** Oxcyon's knowledge management platform, Centralpoint, manages the full lifecycle of knowledge assets — creation, indexing and classification, governance, search, and secure delivery.
- **Robust Functional Capabilities:** Centralpoint met more of LACERA's 245 functional requirements than any competing system.
- **Flexibility:** Knowledge can be ingested into Centralpoint or left in SharePoint — fully indexed either way. Additionally, the platform is modular, user-friendly, and visually polished for everyday staff use.



- March 19, 2024 - The IT Coordination Council approval
- June 5, 2024 - The Operations Oversight Committee approval
- March 2025 - LACERA engaged Taxonomy Strategies
- A dedicated core team leads the effort:
 - JJ Popowich (Executive Sponsor)
 - Eugenia Der (Project Lead)
 - David Choe (Project Manager)
 - Paola Johns (Project Assistant)
 - Alex Ochoa (Project Subject Matter Expert)
- Work began with the five Member Operations Group (MOG) divisions (Member Services, Benefits, Disability Retirement Services, Quality Assurance, Communications), Retiree Healthcare, and the Compass Library.

Building the Foundation



Taxonomy and requirements

- Taxonomy Strategies reviewed and tagged more than 3,500 knowledge assets across the MOG divisions, Retiree Healthcare, and Compass Library.
- Repeated working sessions with subject-matter experts produced a single, uniform taxonomy for the new system.
- Taxonomy Strategies defined 245 functional requirements spanning asset creation, storage and management, taxonomy management, and the end-user application for the future knowledge management system.
- The Systems Division added 41 technical requirements.



Selected firm is to provide LACERA with the following scope of services:

Overview

LACERA is seeking a knowledge management (KM) solution that will support taxonomy management and provide a search and insight engine across their knowledge assets. It should include review and approval workflows that can enable basic content management including tagging and classification. LACERA anticipates the KM application **will complement** their existing Microsoft 365 E5 plan which has been scoped to support 600 LACERA end users. The knowledge base must also be able to integrate with AI solutions (such as chatbots, etc.) allowing internal staff and external members to access a common knowledge base as permitted by asset sensitivity limitations.

Capabilities

- Functional Requirements must include asset creation, storage and management, taxonomy management, and end-user application. (Vendors were evaluated against 245 functional requirements.)
- Solution must comply with all LACERA technical and security requirements.

The RFP Process

Published October 31, 2025



Event	Date
RFP released	October 31, 2025
Intent to respond	November 14, 2025
Written questions due	November 21, 2025
LACERA responses issued	December 12, 2025
Proposals due	December 19, 2025
Finalist interviews	Q1 2026 (estimate)
Selection notification	Q2 2026 (estimate)
Commencement of work	Upon contract execution



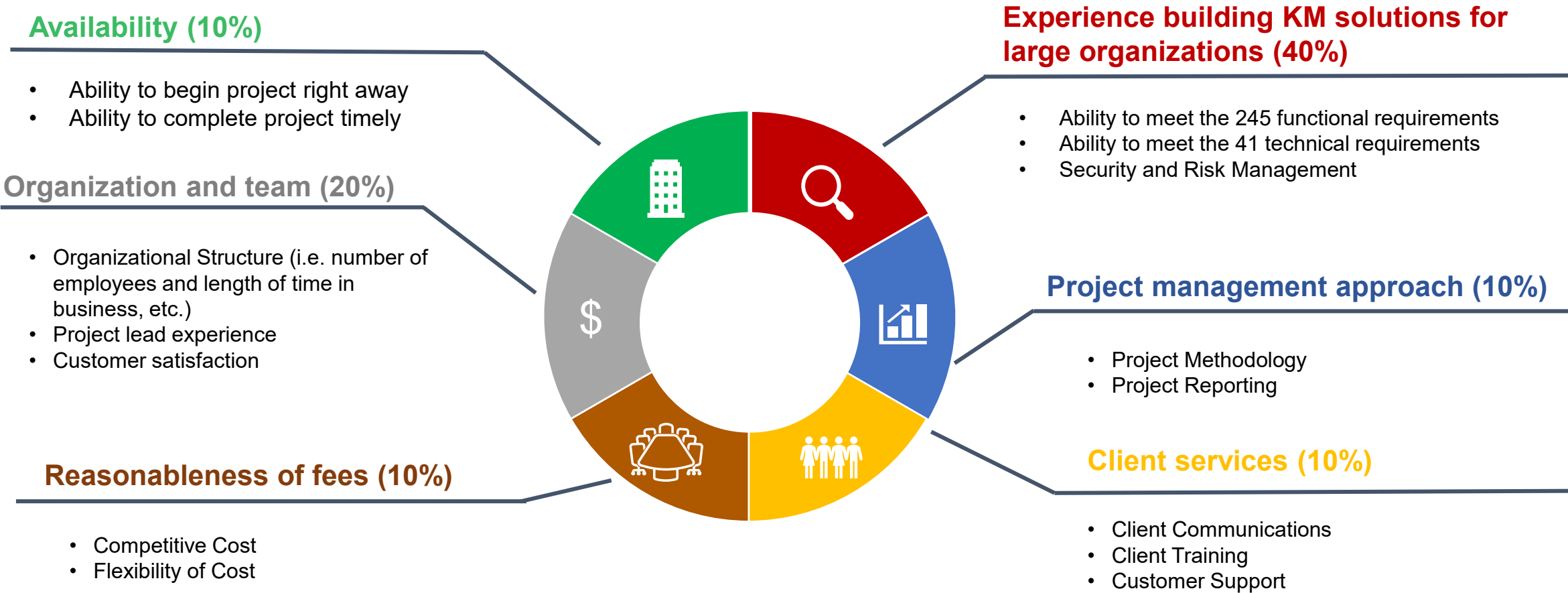
Ten Proposals Received

- Ten vendors submitted proposals by the December 19, 2025 deadline.
- First-year costs ranged widely — from \$448,400 to \$1,528,000.
- **Respondents:** Eccentex, Enterprise Knowledge, Oxcyon, Progress Semaphore, Quisitive, Speridian, Squirro, Top Quadrant, Upland, and WorkMethods.
- Every proposal was scored against the same weighted criteria.

Evaluation Criteria



The Evaluation Team scored proposals based on the following categories:



Scoring scale: 3 fully meets · 2 minor gaps · 1 partially meets · 0 does not meet (3.00 maximum, scores averaged).

RFP Proposal Scores



Only proposals scoring 2.00 or higher advanced to a live demo (3.00 maximum)





Live Product Demonstrations

Finalists demonstrated against real assets

- Each finalist worked with a secured SharePoint site of roughly 500 LACERA knowledge assets, following a demo script drawn from the requirements.
- Division managers and their teams observed the demos and gave feedback to the raters.
- Demonstrations were scored 0–3 on how fully they met the functional and technical requirements.
- Oxcyon's Centralpoint outperformed every other system.

Vendor	Demo Score
Oxcyon	2.32
Speridian	1.65
Enterprise Knowledge	1.63
WorkMethods	1.55
Quisitive	1.37
Eccentex	1.16



Centralpoint Capabilities

Highlights

- Configurable, visually friendly dashboards surfacing tasks and asset information.
- User-level security and access-control groups for every knowledge asset.
- Workflow creation and management, plus identification and consolidation of duplicate records.
- Taxonomy and metadata management, with automatic assignment to LACERA's taxonomy.
- Full-text indexing of every word in a knowledge asset.
- Universal governance rules.
- Multiple search modes: federated across databases, filtered, natural-language, and browse.
- Version-history tracking and managed comment threads on each asset.
- Modify the universal taxonomy directly within the platform.
- Integration with LACERA's Active Directory.



Independent Due Diligence

Reference checks and customer feedback

- The team requested references from Bruno Independent Living Aids, Ontologex (consultant to the Cook County Pension Fund), and the U.S. House Intelligence Committee.
- Bruno and Ontologex gave strongly positive feedback on customer service, usability, budget adherence, and overall satisfaction.
- Both organizations continue to run Centralpoint today.

Security & Technical Review



Vetted by Systems and Information Security

- The core team met with the Systems Division and the Information Security Office to review technical and security concerns.
- At LACERA's request, Oxcyon provided additional security and risk-management protocols for review.
- A follow-up technical session on June 1, 2026, resolved remaining questions.
- Systems and Information Security approved moving forward with Oxcyon.

Oxcyon Company Profile

A proven public-sector partner



- Privately held U.S. technology company founded in 2000, headquartered in Fairlawn, Ohio, with about 142 full-time employees.
- Specializes in secure, compliant enterprise platforms for government, utilities, healthcare, and other regulated organizations.
- Centralpoint is a Gartner-recognized Digital Experience Platform used by more than 350 organizations nationwide.
- Continuous bi-weekly platform enhancements, delivered by a fully U.S.-based team.

Diversity, Equity, & Inclusion



Oxcyon is committed to fostering a diverse, equitable, and inclusive workplace where all individuals are treated with dignity and respect.



Formal DEI policy. Written DEI & Anti-Harassment Policy covering all protected characteristics implemented and enforced by Oxcyon's Director of Operations, Human Resources Lead, and Executive Leadership Team.



Diverse Workforce. 38% of Oxcyon leadership is women. 40% of Oxcyon workforce is women. 30% of workforce identifies as ethnically diverse.



Clean 25-year record. Zero discrimination or harassment findings, claims, or settlements across 140+ staff since 2000.



Mandatory annual DEI training. Every employee completes a 23-course DEI curriculum yearly.



Inclusion built into the product. Centralpoint meets WCAG 2.0–2.2 AA accessibility, so the KMS every LACERA employee uses will be usable by all.

Recommendation & Cost



Within the approved budget

\$451,750

First-year cost

Implementation, licensing, and cloud hosting

\$992,750

Three-year total

Total anticipated cost

\$500,000

FY 2026–27 budget

Budgeted under the Systems Division

The recommended solution is fully funded within the approved budget.



Implementation Roadmap (Proposed)

Oxcyon's four-phased approach

Phase 1 Kickoff & Discovery	Phase 2 Configuration & Build	Phase 3 Testing & Validation	Phase 4 Launch & Transition
• Project kickoff • Stakeholder interviews & requirements validation • Knowledge inventory & source review • Security, access & governance planning • Initial UI and portal design	• Taxonomy & metadata configuration • Role-based access & workflows • Ingestion & indexing rules • Search, analytics & dashboards • UI branding & portal layout	• Content ingestion & validation • Workflow & security testing • User acceptance testing • Refinements from feedback • Training & documentation	• Production deployment • Final data synchronization • Go-live support • Post-launch stabilization • Transition to ongoing support

Beyond Go-Live



Phased rollout across LACERA

- The schedule will be refined to LACERA's resource availability and in consultation with subject-matter experts.
- After a successful launch with the five MOG divisions, Retiree Healthcare, and the Compass Library, the team will extend Centralpoint to LACERA's other divisions.
- The anticipated result: a single, governed home for institutional knowledge across the organization.



Recommended Action

- **It is recommended that the Board of Retirement** authorize staff to engage Oxcyon, Inc. for an enterprise-wide knowledge management system to capture, organize, and access critical business knowledge.
- **At a** first-year cost of \$451,750 and three-year total of \$992,750.



Questions?

Eugenia Der | eder@lacera.gov
David Choe | dchoe@lacera.gov

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[My Spaces](#)

My Profile

Welcome back, **John!**

Knowledge Article Admin with Oxycon, Inc.

Your role: **Administrators**

John Hunter

You're #1 (2524 pts)

John is a seasoned Administrator at Oxycon, specializing in KM, Data Aggregation

Rank	Clicks	Comments	Forms	Records	Tests	Searches	Points
#1	107	0	214	2,160	29	Searches	2,524

Showing 1 to 1 of 1 entries

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Knowledge Assets by Type

- Brochures
- Checklists
- Legislation
- Schedules
- Standard Operating Procedures
- Tutorials
- User Guides
- Workflows

Assets Missing Metadata

3.3%

MISSING METADATA

2 records missing

61 total assets

AFFECTED ASSETS

Document Title	Record ID
Document without Metadata	b391517f-0523-f111-91ca-005056883787
Sample Document	57ed2c03-e5da-4c15-82a5-b70be25d2c3f

Appendix (cont'd)



Sample Access Control Group view

L/CERA

Search Centralpoint

Home

Browse

Create/Manage

Ingestion & Workflow

My Spaces

John

Access Control Groups

Expand All

Reset All

Save All Changes

Filter Users:

Type name or username...

Modules:

Discovery

KBase

KBase Wikilinks

MORI

MSOI

Permissions:

Create

Upload

Edit

Review

Approve

Publish

JO

John Hunter

jfrey@oicyn.com

No Group

PERMISSION	DISCOVERY	KBASE	KBASE WIKILINKS	MORI	MSOI
Select All	☐	☐	☐	☐	☐
☐ Create	☐	☐	☐	☐	☐
☐ Upload	☒	☐	☐	☒	☐
☐ Edit	☐	☒	☐	☐	☐
☐ Review	☐	☐	☒	☒	☐
☐ Approve	☐	☐	☐	☐	☐
☐ Publish	☐	☐	☐	☐	☐

✓ Select All

✗ Clear

✓ Save User

JL

Jill Wilson

education@oicyn.com

No Group

PERMISSION	DISCOVERY	KBASE	KBASE WIKILINKS	MORI	MSOI
Select All	☐	☐	☐	☐	☐
☐ Create	☐	☐	☐	☐	☐
☐ Upload	☐	☐	☐	☐	☐
☐ Edit	☐	☐	☐	☐	☐
☐ Review	☐	☐	☐	☐	☐
☐ Approve	☐	☐	☐	☐	☐
☐ Publish	☐	☐	☐	☐	☐

✓ Select All

✗ Clear

✓ Save User

Appendix (cont'd)



Sample Search Results view

LACERA

Q "Quality Assurance Division"

Home Browse Create/Manage Ingestion & Workflow My Spaces John

NEW SEARCH

FILTER BY

SEE ALL

Nav

Events

News

Videos

GenA

GenB

GenC

GenD

GenE

GenF

Photos

Productcts

Blogs

Docs

Staff

Media

Search Results: "Quality Assurance Division"

Grid View

List View

Download Files

Export

Gridview

Timeline

Copy Link

Select All

Clear All

Results 1 - 50 of 50

1.

☐

[Introduction](#)

Discovery

Quality Assurance Division

Tutorials, LACERA Employees, 30-Year Cancellation

Everyone: All Users

3/13/2026

Relevance: 778

2.

☐

[Introduction to Resources 2024](#)

Discovery

Quality Assurance Division

Tutorials, LACERA Employees, Internal Procedures, eHR, Workspace

Everyone: All Users

3/13/2026

Relevance: 746

3.

☐

[Withdrawal PowerPoint 2025 Script DB final edits](#)

Discovery

Quality Assurance Division

Tutorials, LACERA Employees, Withdrawn Contributions

Everyone: All Users

3/13/2026

Relevance: 733

4.

☐

[ASU Copy](#)

Discovery

Quality Assurance Division

Tutorials, LACERA Employees, Account Settlements

Everyone: All Users

3/13/2026

Relevance: 733



MY SUMMER INTERNSHIP AT **L//CERA**

Angela Cooley | Legal Intern

About Me



BACKGROUND

From Cerritos, CA. First-generation law student.

Both of my parents are county workers, and my mom recently became a LACERA retiree!

EDUCATION

UC Berkeley (Class of 2024)

B.A. Legal Studies with Honors, Minor in Data Science

UC Law San Francisco (formerly UC Hastings) (Class of 2028)

Incoming Staff Editor, UC Law Science & Technology Journal

Incoming Pro Bono Project Lead

Research Assistant, Center for Social Justice

NEXT SUMMER

Currently applying for Summer 2027 internships (accepting career advice).

Interested in administrative law and how technology can improve public services.

LEGAL DIVISION



- 1. Litigation**
- 2. Transactions**
- 3. Benefits**
- 4. Disability**
- 5. Legislation**



LITIGATION

Observed how legal advocacy takes shape through investigation, writing, and hearing preparation.

LITIGATION PROJECTS



Objection Memo

Supervising Attorney: Jason Waller

- Drafted objections challenging referee's recommended decision in a disability retirement appeal.
- Analyzed hearing evidence, medical records, and expert opinions to support legal arguments.

Administrative Appeal Memo

Supervising Attorney: Michael Herrera

- Drafted a Board memo addressing a disputed retirement benefits determination.
- Analyzed legal authority, administrative records, and litigation considerations supporting recommended outcome.

LITIGATION PROJECTS



Disability Retirement Hearing

Supervising Attorney: Jason Waller

- Prepared hearing notes and exhibit summaries during an administrative appeal hearing.
- Assisted with witness examination by presenting cross-examination questions.

Initial Case Review and Plan of Action

Supervising Attorney: Eugenia Der

- Prepared plan of action with key medical, factual, and procedural developments in a disability retirement case.
- Reviewed case materials to identify potential witnesses, evidentiary issues, and areas for additional investigation.





TRANSACTIONS

Saw how transactional attorneys support institutional investors before disputes ever arise.

TRANSACTIONS PROJECTS



Confidentiality Agreement Review

Supervising Attorney: Susan Wang

- Reviewed proposed confidentiality agreement against LACERA precedent and preferred provisions.
- Drafted revisions and cover email explaining proposed changes.

MFN Election Analysis

Supervising Attorney: Avi Herescu

- Reviewed side letter election provisions.
- Evaluated which provisions would provide meaningful legal or operational protections.



TRANSACTIONS PROJECTS



Private Investments Primer Series

Supervising Attorney: Susan Wang

- Participated in weekly discussions regarding private fund structures, investment terms, and LP protections.
- Explored how legal counsel supports institutional investors throughout investment lifecycle.

Takeaway: Built foundational understanding of private fund structures and investor protections.





BENEFITS

Learned how legal interpretation shapes retirement benefits and Board decision-making.

BENEFITS PROJECTS



Interactive DRO Research Project

Supervising Attorney: Elaine Salon

- Compared community property guides and model DRO provisions used by other CERL systems.
- Evaluated approaches to retirement elections, death benefits, and division-of-benefit scenarios.

Takeaway: Comparing other CERL systems revealed ways to make complex DRO provisions more accessible and consistent.



BENEFITS PROJECTS



Pensionability Analysis Memoranda

Supervising Attorney: Jean Kim

- Prepared two Board memoranda evaluating whether compensation items should be included in pensionable earnings.
- Applied CERL, PEPRRA, and Board precedent to analyze employer compensation structures.

Medicare Part B Eligibility Research

Supervising Attorney: Jean Kim

- Researched Medicare eligibility and reimbursement requirements.
- Applied federal authority and LACERA plan provisions to a retiree healthcare benefits question.



DISABILITY

Learned how disability retirement decisions are supported through medical, legal, and procedural analysis.

DISABILITY PROJECTS



Heart Presumption Memo

Supervising Attorneys: Frank Boyd and Allison Barrett

- Drafted a Board memo regarding service-connected disability retirement eligibility under Government Code section 31720.5 (Heart Presumption).

Procedural Conference for Disability Benefits Appeal

Supervising Attorney: Jason Waller

- Conducted a procedural conference with a disability retirement appellant.
- Explained filing requirements, hearing procedures, deadlines, and appeal rights.





LEGISLATION

Gained insight into the intersection of retirement law, public policy, and legislative advocacy.

LEGISLATION PROJECTS



SACRS Legislative Committee Meeting

Supervisor: Barry Lew

- Participated in legislative training and observed a SACRS Legislative Committee meeting.
- Learned how retirement systems evaluate legislation, develop advocacy positions, and pursue statutory reform.

Takeaway: Saw how retirement system legal issues can become policy and legislative priorities.



Reflections & Thanks



- Public pension law is incredibly diverse.
- Working across different practice areas reinforced the human impact of public service legal work.
- I learned the importance of balancing legal analysis with the operational needs of an organization.

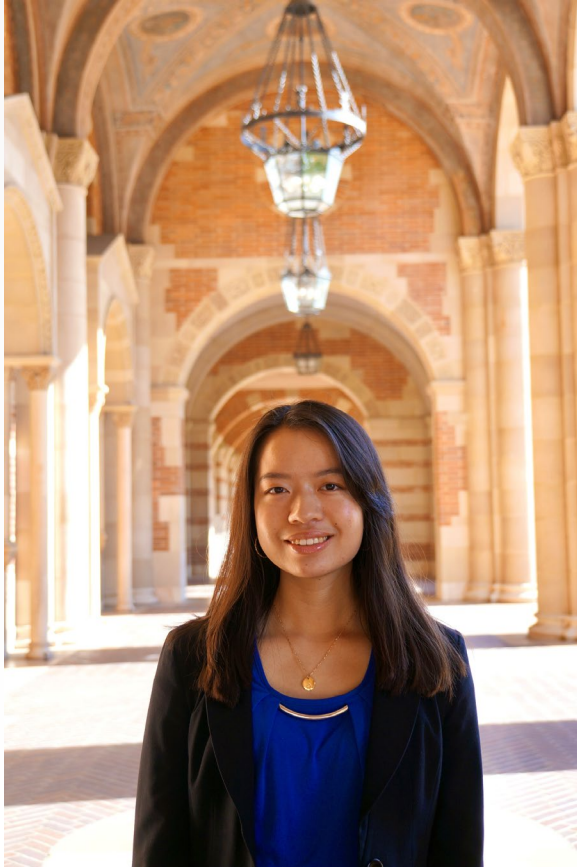
Thank you to everyone in the Legal Division for your mentorship, patience, and willingness to invest in my internship experience!



MY SUMMER LEGAL INTERNSHIP WITH LACERA

By: Sophia Hua

Education and Law School Goals



- Hometown: Alhambra, CA
- Rising 2L at Washington and Lee University School of Law (W&L)
- B.A. Political Science at UCLA
- Extracurriculars:
 - Incoming staff writer at W&L Law Review
 - Asian Pacific American Law Student Association
 - First Generation Student Union
 - Law School Football League
- Next summer: currently applying for public interest or public sector



The Legal Division

- **Transactions**
- **Litigation**
- **Benefits**
- **Disability**
- **Legislation**



Transactions

Transactions: Investments Projects



1. Non-Disclosure Agreement (NDA) Project

Supervising Attorney: Susan Wang

- Reviewed and analyzed NDA provisions
- Proposed favorable changes based on previous NDAs and internal references

2. Investments and Transactions Primer

Supervising Attorney: Susan Wang

- Participated in weekly lessons regarding investment funds

Transactions: Investments Projects



3. Most Favored Nation (MFN) Project

Supervising Attorney: Avi Herescu

- Reviewed an MFN packet for an investment and evaluated potentially beneficial provisions
- Cross-referenced:
 - Side Letter
 - Private Placement Memorandum (PPM)
 - Subscription Documents



Litigation



1. Administrative Appeal Memorandum for the Board of Retirement

Supervising Attorney: Michael Herrera

- Assisted in drafting a legal analysis and recommendation memo in connection with a disputed benefits-related matter
- Participated in cross-departmental meetings regarding beneficiary calculations and member records



2. Code of Ethical Conduct Project

Supervising Attorney: Jessica Rivas

- Drafted trivia and scavenger hunt questions for the new Code of Ethical Conduct
- Attended discussions regarding the Code at:
 - Audit, Compliance, Risk, and Ethics (ACRE) Meeting
 - Leadership Steering Council (LSC) Team Meeting
 - Management Action Team (MAT) Meeting



Benefits

Benefits Projects



1. Pensionability Memorandum

Supervising Attorney: Jean Kim

- Drafted a memo regarding the pensionability of two new pay items for the July 2026 BOR meeting
- Analysis based on:
 - Cal Govt. Code Sections 31461 and 7522.34
 - Internal records
 - Previous memos



2. Beneficiary Disclaimer

Supervising Attorney: Elaine Salon

- Researched and reviewed California Probate Code Sections 275 and 278
- Drafted a disclaimer for designated beneficiaries and heirs at law who wish to waive or disclaim their assigned benefits



Disability



1. Objection to Referee's Proposed Findings of Fact and Recommended Decision (PFFRD)

Supervising Attorney: Jason Waller

- Drafted an objection to the Referee's PFFRD in a disability retirement appeal
- Analyzed governing law, precedent, and medical evidence



2. Initial Case Review & Plan of Action

Supervising Attorney: Eugenia Der

- Reviewed all relevant case documents for a disability retirement appeal
- Created case plan of action with relevant disability retirement events

3. Administrative Appeal Hearing

Supervising Attorney: Eugenia Der

- Prepared for and participated in a member's disability retirement appeal hearing



4. Good Cause Memorandum

Supervising Attorneys: Allison Barrett & Frank Boyd

- Drafted a memo regarding good cause to allow an applicant to amend a disability retirement application to include an earlier effective date



Legislation

Legislation Projects



1. State Association of County Retirement Systems (SACRS) Legislative Committee Meeting and Training

Supervisor: Barry Lew

- Participated in a legislative training session
- Attended the SACRS Legislative Committee Meeting, learning about:
 - Upcoming and past bills which affected statewide pension plans
 - Proposed amendments to current statutes

Conclusion



- Incredible opportunities and hands-on-experience across a variety of practice areas
- Rewarding and enriching summer experience working alongside very skilled and knowledgeable people
- Grateful for the guidance and support from the Legal Division
- Grateful for how warm and welcoming all LACERA staff members have been

FOR INFORMATION ONLY

July 17, 2026

TO: Each Trustee
Board of Retirement

FROM: James C. Beasley Jr. 
Supervising Administrative Assistant II

FOR: August 5, 2026, Board of Retirement Meeting

**SUBJECT: LACERA Property and Liability Insurance Renewal
Summary Update**

EXECUTIVE SUMMARY

LACERA maintains a comprehensive property and liability insurance program designed to protect the organization, its fiduciaries, employees, assets, operations, and the retirement trust from a broad range of financial and operational risks.

For the 2026–27 policy year, LACERA successfully renewed its insurance program under the Chief Executive Officer's delegated authority. The renewed program provides stable or enhanced coverage across major lines while reducing overall program costs compared to the prior year. During the renewal process, staff evaluated emerging risks, market conditions, optional coverage enhancements, and insurer financial strength to ensure the program continues to align with LACERA's risk management objectives.

This memorandum is provided to the Board of Retirement for information only and summarizes the key outcomes of the renewal process, notable coverage decisions, and emerging trends observed within the insurance marketplace.

RENEWAL HIGHLIGHTS

Key outcomes of the 2026–27 insurance renewal include:

- Total program premium decreased approximately \$15,308 (1.19 percent) compared to the prior year.
- No reductions in coverage limits or key policy protections.

- Significant savings achieved in Difference-in-Conditions (Earthquake & Flood) coverage.
- LACERA continues to maintain \$35 million in Fiduciary Liability coverage protecting trustees, officers, and employees against covered fiduciary claims.
- LACERA continues to maintain \$20 million in Cyber Liability coverage protecting against cyberattacks, ransomware, business email compromise, data breaches, and related operational disruptions.
- Workplace Violence (Deadly Weapons Response) coverage added to address a previously uninsured exposure.
- Employment Practices Liability limits were evaluated and maintained at \$7 million.
- Staff reviewed emerging Artificial Intelligence and cybersecurity risks as part of the renewal process.

INSURANCE RENEWAL COVERAGE & COST OVERVIEW

The 2026–27 insurance program continues to provide protection across LACERA's major risk exposures, including property, general liability, automobile liability, earthquake, crime, cyber liability, employment practices liability, fiduciary liability, foreign travel, and business travel accident coverages.

Overall renewal results were favorable despite ongoing volatility within the commercial insurance marketplace. Several coverage lines experienced premium reductions, most notably Commercial Auto and Difference-in-Conditions coverage, while other major coverages renewed with stable pricing and terms. Property, cyber liability, fiduciary liability, employment practices liability, and crime coverages were successfully renewed without reductions in coverage limits or key policy protections.

The renewed insurance program continues to provide a layered risk financing structure designed to protect LACERA against both high-frequency operational losses and low-frequency, high-severity events that could impact organizational operations or fiduciary responsibilities.

INSURANCE PROGRAM SUMMARY

The table below summarizes the major insurance coverages, selected carriers, coverage limits, and premium changes associated with the 2026–27 Property and Liability Insurance Program. This summary reflects the insurance program renewed under the Chief Executive Officer's delegated authority.

Coverage Type	Limits*	FY 2025-2026 Premium	FY 2026-2027 Premium	Difference
Business Package	Various	\$51,830	\$49,174	\$2,656
Foreign Package	Various	\$2,000	\$4,640	(\$2,640)
Umbrella	\$25 Million	\$18,425	\$18,952	(\$527)
Terrorism Liability	\$45 Million	\$4,471	\$4,471	\$0
Difference-in-Condition	\$25 Million	\$93,589	\$63,095	\$30,494
Employment Practices Liability	\$5 Million	\$205,328	\$205,328	\$0
Employment Practices Liability (Excess)	\$2 Million	\$47,760	\$47,760	\$0
Fiduciary Liability	\$20 Million	\$298,735	\$304,475	(\$5,740)
Fiduciary Liability (Excess)	\$10 Million	\$111,961	\$114,266	(\$2,305)
Fiduciary Liability (Excess)	\$5 Million	\$38,529	\$39,304	(\$775)
Fiduciary Liability OPEB	\$10 Million	\$56,289	\$57,965	(\$1,676)
Cyber Liability	\$5 Million	\$118,858	\$118,858	\$0
Cyber Liability (Excess)	\$5 Million	\$88,993	\$88,993	\$0
Cyber Liability (Excess)	\$5 Million	\$71,192	\$70,162	\$1,030
Cyber Liability (Excess)	\$5 Million	\$54,685	\$54,685	\$0
Crime Protection	\$10 Million	\$22,414	\$22,414	\$0
Travel Insurance	Various	\$4,806	\$4,806	\$0
Workplace Violence	\$500,000	\$0	\$5,209.15	(\$5,209)
FY 2025-26 Insurance Renewal Premium Total:			\$1,289,865	
FY 2026-27 Insurance Renewal Premium Total:			\$1,274,557	
Net Premium Difference:			\$15,308	

Premium amounts include taxes, fees, and rebates.

Differences in parentheses indicate increase from the previous year.

**See Appendix A for further information on the coverage details.*

The renewal resulted in favorable overall outcomes, including premium reductions in several coverage lines, most notably Commercial Auto and Difference-in-Conditions coverage, while maintaining broad protection across LACERA's major operational, fiduciary, cyber, employment, and property-related exposures.

EMERGING RISKS AND INSURANCE MARKET TRENDS

As part of the annual renewal process, staff reviews emerging risks and insurance market developments that may affect LACERA's future insurance needs.

Artificial Intelligence

The insurance industry continues to evaluate potential legal, cybersecurity, privacy, employment, and operational risks associated with the increasing use of AI. In coordination with LACERA's insurance broker, staff reviewed current policy language and confirmed that the renewed insurance program does not presently contain AI-specific exclusions that would materially restrict coverage for AI-related exposures. Staff will continue monitoring developments in this evolving area as insurers refine underwriting practices and policy language.

Cybersecurity Risk

Cybersecurity remains one of the most significant and rapidly evolving risks facing public agencies and financial institutions. LACERA's Information Security Office continues to strengthen the organization's cybersecurity posture through ongoing monitoring, security controls, and risk mitigation efforts. Complementing these activities, LACERA maintains a layered Cyber Liability Insurance program providing \$20 million in coverage for cyber-related incidents, including data breaches, extortion, business interruption, incident response, forensic investigations, and legal expenses. Staff will continue to monitor emerging threats and changing insurance market conditions to ensure coverage remains appropriate.

Workplace Violence Coverage

Staff also evaluated emerging workplace violence exposures and available insurance solutions designed to address organizational response and recovery needs following a violent incident.

As a result of that review, LACERA added Workplace Violence (Deadly Weapons Response) coverage to the 2026–27 insurance program. The coverage provides specialized resources and financial protection associated with workplace violence incidents, including crisis response support, recovery assistance, counseling services,

business interruption-related expenses, and certain first- and third-party costs. The addition of this coverage addresses a previously uninsured exposure and further strengthens LACERA's overall risk management framework.

Employment Practices Liability Evaluation

During the renewal process, staff reviewed an option to increase Employment Practices Liability coverage limits from \$7 million to \$10 million through the purchase of an additional excess liability layer. Following an evaluation of organizational exposure, risk tolerance, market conditions, and the associated premium increase, LACERA elected to maintain its existing \$7 million limit.

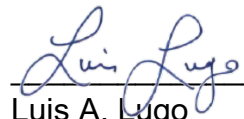
FISCAL IMPACT

The total cost of the 2026–27 Property and Liability Insurance Program is approximately \$1.27 million. The renewal reflects an overall premium reduction of approximately \$15,308 (1.19 percent) from the prior year's premium of \$1.29 million. The reduction was achieved while maintaining comprehensive coverage and adding Workplace Violence (Deadly Weapons Response) protection to address an emerging organizational risk.

CONCLUSION

The 2026–27 insurance renewal resulted in a comprehensive and cost-effective insurance program that continues to support LACERA's operational, financial, and fiduciary responsibilities. The renewal maintained broad coverage protections, addressed emerging risks through targeted coverage enhancements, and achieved an overall reduction in program costs. The insurance program has been renewed under the Chief Executive Officer's delegated authority and is presented to the Board of Retirement for information only.

Reviewed and Approved:

A handwritten signature in blue ink, reading "Luis Lugo", is written over a horizontal line.

Luis A. Lugo
Deputy Chief Executive Officer

Attachments - APPENDIX A Coverage Details



APPENDIX A Coverage Details

BUSINESS INSURANCE PACKAGE

LACERA's Business Insurance Package consolidates four essential lines of coverage—Business Personal Property, General Liability, Employee Benefits Liability, and Commercial Auto—into a comprehensive risk management solution that supports the organization's operational continuity and financial protection.

- **Business Personal Property:** Covers equipment, furniture, fixtures, and inventory owned, used, or rented by LACERA. It includes restoration of LACERA-occupied spaces following a covered loss but excludes structural damage to Gateway Plaza, which is insured under the building manager's policy.
- **General Liability:** Protects against third-party claims for bodily injury, property damage, and personal injury arising from LACERA's operations. This includes incidents such as visitor injuries occurring on LACERA premises.
- **Employee Benefits Liability:** Covers errors or omissions in the administration of employee benefit programs, such as failure to enroll or notify staff of available benefits. It protects LACERA from liability but does not cover the unpaid benefits themselves.
- **Commercial Auto:** Offers liability and physical damage coverage for LACERA-owned, rented, or hired vehicles. It includes protection for both third-party claims and LACERA's losses resulting from vehicle-related incidents.

Commercial Insurance Package Coverage	
Insurance Company:	Continental National American Group (CNA)
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$49,174
Business Property Limits	
Business Personal Property & Contents	\$25,000,000
Business Income (Including Expenses)	\$20,000,000



Earthquake - Sprinkler Leakage Only	\$5,000,000 occurrence/aggregate
Equipment Breakdown-spoilage	\$250,000
Ordinance of Law	\$500,000
Electronic Data Processing (EDP) Equipment	Included
Equipment Breakdown	Included
Deductible:	
Property All Risk	\$5,000
Earthquake - Sprinkler Leakage	\$25,000
General Liability/Employee Benefits Limits	
General Aggregate	\$2,000,000
Products & Completed Operations Aggregate	\$2,000,000
Personal & Advertising Injury	\$1,000,000
Each Occurrence	\$1,000,000
Damage to Premises Rented to You	\$1,000,000
Medical Expense	\$15,000
Employee Benefits Per Employee	\$1,000,000
Employee Benefits Aggregate	\$1,000,000
Deductible:	
Each Occurrence	N/A
Employee Benefits Liability	\$1,000
Commercial Auto Limits	
Liability	\$1,000,000 combined single limit
Uninsured Motorist	\$1,000,000 combined single limit
Medical Payments	\$5,000
Comprehensive	Included
Collision	Included
Rental Reimbursement	\$40.00 Maximum daily amount 30 Days - Maximum number of days \$1,200 Maximum payment for any one period
Hired Auto Liability	\$1,000,000



Non-Owned Liability	\$1,000,000
Deductible:	
Comprehensive	\$1,000
Collision	\$1,000

FOREIGN BUSINESS INSURANCE PACKAGE

LACERA maintains a Foreign Business Insurance Package to ensure comprehensive protection for operations and travel conducted outside the United States. This package mirrors the coverage provided under the Domestic Business Insurance Package—including Property, General Liability, Employee Benefits Liability, and Commercial Auto—but extends those protections internationally.

Foreign Business Insurance Package	
Insurance Company:	CNA
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$4,640
Limits	
Personal Property, Business Income, & Extra Expense Combined	\$25,000 Each occurrence
Commercial General Liability Each Occurrence Limit	\$1,000,000
Employee Benefits Liability	\$1,000,000 Each employee limit per occurrence/ all claims in the Aggregate Limit
Business Auto Covered Autos Liability Coverage	\$1,000,000
Business Travel Accidental Death and Dismemberment	\$500,000 Annual aggregate/per incident
Kidnap and Ransom/Wrongful Detention	\$250,000 Each occurrence/ total policy aggregate
Deductible:	
Personal Property, Business Income, & Extra Expense	\$1,000
Commercial General Liability	Not applicable
Employee Benefits Liability	\$1,000 Per employee damages only



Business Auto Covered Autos	Not applicable
Business Travel Accidental Death & Dismemberment	Various
Kidnap & Ransom	\$0

UMBRELLA LIABILITY INSURANCE

LACERA maintains a \$25 million Umbrella Liability Insurance policy that provides an additional layer of protection above the limits of its underlying liability coverages, including General Liability, Auto Liability, and Employee Benefits Liability. This policy is designed to respond when the limits of those primary policies are exhausted or when certain claims fall outside their scope.

Umbrella Package Coverage	
Insurance Company:	CNA
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$18,952
Limits	
Each Incident	\$25,000,000
General Aggregate	\$25,000,000
Products-Completed Operation Aggregate	\$25,000,000
Crisis Management Expenses Aggregate	\$300,000
Key Employee Replacement Expenses Aggregate	\$100,000
Self-Insured Retention	\$10,000

TERRORISM AND SABOTAGE

LACERA maintains Terrorism Insurance to protect against financial losses resulting from acts of terrorism or sabotage. In the event of a declared terrorism incident or confirmed attempt to target LACERA, this coverage provides critical support in two key areas:

- **Property Damage:** Covers the repair or replacement of damaged or destroyed personal property—including equipment, furnishings, and inventory owned, used, or rented by LACERA—as well as debris removal costs.



- **Business Interruption:** Reimburses LACERA for lost income and additional operational expenses incurred due to a covered terrorism event, such as temporary relocation or staffing needs.

Terrorism and Sabotage Coverage	
Insurance Company:	Indian Harbor Insurance Company
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$4,471
Limits	
Liability	\$45,000,000 Per occurrence/aggregate
Deductible	
Per Occurrence	\$10,000

DIFFERENCE-IN-CONDITIONS - EARTHQUAKE/FLOOD

LACERA maintains a Difference-In-Conditions (DIC) insurance policy to address catastrophic risks not covered under standard property insurance, specifically earthquakes and floods. While the building manager, Avison Young, carries DIC coverage for structural damage to Gateway Plaza—including walls, roof, and foundation—this policy does not extend to LACERA’s owned or used property. LACERA’s DIC policy fills this critical gap.

The DIC policy provides coverage for:

- **Business Personal Property:** Equipment, furniture, fixtures, and inventory owned, used, or rented by LACERA.
- **Business Income and Extra Expense:** Lost income and additional operational costs resulting from a covered event, including temporary relocation and staffing.
- **Fine Arts:** Artwork and other valuable items owned by LACERA.
- **Electronic Data Processing (EDP) Equipment and Media:** Computers, servers, and data storage devices essential to LACERA’s operations.
- **Valuable Papers and Records:** Important documents such as contracts, leases, and financial records.



Difference-in-Conditions (DIC) Coverage	
Insurance Company:	QBE Specialty Insurance Company
A.M. Best Rating:	A (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$63,095
Limits	
Loss Limit	\$25,000,000
Deductible:	
Earthquake & Earthquake Sprinkler Leakage	10% Physical damage 10% Time element subject to \$50,000 Minimum per occurrence
Flood	2% Per unit Subject to \$50,000 minimum per occurrence
All Other Perils	\$25,000

EMPLOYMENT PRACTICES LIABILITY INSURANCE

LACERA maintains Employment Practices Liability Insurance (EPLI) to protect against claims arising from employment-related issues, including allegations of discrimination, harassment, wrongful termination, and other workplace practices. This coverage applies to claims brought by prospective, current, or former Staff Members.

Given the potential for high legal defense costs, even in cases where claims are dismissed, EPLI provides critical financial protection. It ensures that LACERA has the resources to defend against such claims and, if necessary, to cover settlement or judgment costs.

Importantly, LACERA retains the option for choice of counsel under this policy, allowing the organization to select legal representation that aligns with its operational needs, legal strategy, and institutional knowledge.

Employment Practices Liability Coverage (Primary – 1st Layer)	
Insurance Company:	Ascot Specialty Insurance Company
A.M. Best Rating:	A (Excellent), Financial Size Category: XIII (\$1.25 Billion to Less than \$1.5 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$205,328
Choice of Counsel:	• Glaser Weil LLP and • Sheppard Mullin Richter & Hampton LLP.



Limits	
Aggregate Limit of Liability for All Coverage Parts	\$5,000,000 (Inclusive of Defense Costs; Not Inclusive of Directors & Officers Side A Excess Limit, if applicable)
Third-Party Claim Sub-Limit of Liability	\$3,000,000
Self-Insured Retention	
Each Employment Practices Claim	\$500,000
Third-Party Claim	\$500,000
Mass Action	\$1,000,000

Employment Practices Liability Coverage (Excess – 2nd Layer)	
Insurance Company:	Ironshore Indemnity Inc.
A.M. Best Rating:	A (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$47,760
Limits	
Aggregate Limit of Liability	\$2,000,000

FIDUCIARY LIABILITY

LACERA maintains Fiduciary Liability Insurance to protect the Trust Fund and its fiduciaries against claims alleging mismanagement of the Retirement Plan. This coverage includes legal defense costs and financial losses resulting from errors, omissions, or breaches of fiduciary duty, such as failure to act in the best interests of plan beneficiaries, improper investment decisions, or failure to follow plan guidelines.

LACERA carries a total of \$35 million in fiduciary coverage, structured in three layers:

- \$20 million primary (maximum underwritten by the carrier),
- \$10 million first layer excess, and
- \$5 million second layer excess.

In addition, LACERA maintains a separate **\$10 million Fiduciary Liability policy** to cover the Other Post-Employment Benefits (OPEB) Trust Funds, which are combined under a single policy. These include County OPEB Trust, Superior Court OPEB Trust, and Master OPEB Trust.



Fiduciary Liability Coverage (Primary – 1st Layer)	
Insurance Company:	Encore - Hudson Insurance Company
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$304,475
Limits	
Aggregate Limit of Liability	\$20,000,000
Self-Insured Retention:	
Indemnifiable	\$250,000
Non-indemnifiable	\$0
Class action lawsuits	\$1,000,000

Fiduciary Liability Coverage (Excess – 2nd Layer)	
Insurance Company:	Westchester
A.M. Best Rating:	A++ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$114,266
Limits	
Aggregate Limit of Liability	\$10,000,000

Fiduciary Liability Coverage (Excess – 3rd Layer)	
Insurance Company:	RLI Insurance
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$39,304
Limits	
Aggregate Limit of Liability	\$5,000,000

OPEB Fiduciary Liability Coverage	
Insurance Company:	Encore - Hudson Insurance Company
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$57,965
Limits	



Aggregate Limit of Liability	\$10,000,000
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CYBER LIABILITY INSURANCE

LACERA maintains Cyber Liability Insurance to protect against a wide range of cyber-related threats, including data breaches, ransomware, business email compromise (BEC), and network security failures. The policy provides coverage for data recovery, legal expenses, extortion payments, and business interruption losses. It also includes access to forensic investigation services, crisis management, and public relations support to help mitigate reputational harm following a cyber incident.

LACERA currently maintains \$20 million in dedicated Cyber Liability Insurance coverage through a layered insurance program.

In addition to the dedicated cyber liability policy, certain cyber-related coverages are available through other insurance policies within LACERA's insurance portfolio. For example, LACERA's Fiduciary Liability Insurance includes coverage for Information Breach Response services, including breach notification costs, forensic investigation expenses, credit monitoring services, and content restoration activities. These complementary coverages help provide additional protection for certain cyber-related events and support LACERA's broader risk management framework.

As a result, cyber-related protection is not solely dependent on the standalone Cyber Liability policy but is supported through multiple insurance coverages addressing distinct aspects of cyber and information security risk.

Cyber Liability Coverage (Primary – 1st Layer)	
Insurance Company:	Houston Casualty Group
A.M. Best Rating:	A++ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$118,858
Limits	
Security & privacy liability	\$5,000,000
Privacy regulatory defense & penalties	\$5,000,000
Multimedia liability	\$5,000,000
Breach event costs	\$5,000,000
Network assets protection	\$5,000,000
Cyber extortion	\$5,000,000



Brand guard	\$5,000,000
Dependent business interruption	\$5,000,000
Cybercrime	\$100,000
Self-Insured Retention:	
Per claim	\$100,000

Cyber Liability Coverage (Excess – 2nd Layer)	
Insurance Company:	Homeland
A.M. Best Rating:	A (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$88,993
Limits	
Security & privacy liability	\$5,000,000
Privacy regulatory defense & penalties	\$5,000,000
Multimedia liability	\$5,000,000
Breach event costs	\$5,000,000
Network assets protection	\$5,000,000
Cyber extortion	\$5,000,000
Brand guard	\$5,000,000
Dependent business interruption	\$5,000,000
Cybercrime	\$100,000

Cyber Liability Coverage (Excess – 3rd Layer)	
Insurance Company:	AmTrust
A.M. Best Rating:	A- (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$70,162
Limits	
Security & privacy liability	\$5,000,000
Privacy regulatory defense & penalties	\$5,000,000
Multimedia liability	\$5,000,000
Breach event costs	\$5,000,000



Network assets protection	\$5,000,000
Cyber extortion	\$5,000,000
Brand guard	\$5,000,000
Dependent business interruption	\$5,000,000
Cybercrime	\$100,000

Cyber Liability Coverage (Excess – 4th Layer)	
Insurance Company:	Indian Harbor Insurance
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$54,685
Limits	
Security & privacy liability	\$5,000,000
Privacy regulatory defense & penalties	\$5,000,000
Multimedia liability	\$5,000,000
Breach event costs	\$5,000,000
Network assets protection	\$5,000,000
Cyber extortion	\$5,000,000
Brand guard	\$5,000,000
Dependent business interruption	\$5,000,000
Cybercrime	\$100,000

CRIME PROTECTION INSURANCE

LACERA maintains Crime Protection Insurance to safeguard against financial losses resulting from employee dishonesty, computer fraud, forgery, and other forms of business-related crime. The policy provides coverage for the loss of cash, securities, and other property, as well as legal defense costs associated with covered incidents.

While the crime insurance market remains stable for LACERA, the growing prevalence of social engineering fraud—in which employees are manipulated into disclosing sensitive information or transferring funds—continues to be a concern across the industry. Although insurers have introduced tools and best practices to help mitigate this risk, the increasing frequency and sophistication of such schemes may lead to tighter underwriting standards or premium adjustments in future renewal cycles.

Crime Protection Coverage	
Insurance Company:	Great American
A.M. Best Rating:	A+ (Superior), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$22,414
Limits	
Employee dishonesty	\$10,000,000
Forgery & alterations	\$10,000,000
Inside premises	\$10,000,000
Outside premises	\$10,000,000
Computer fraud	\$10,000,000
Money orders & counterfeit paper currency	\$10,000,000
Fund transfer fraud	\$10,000,000

BUSINESS TRAVEL INSURANCE

The group policy provides coverage for a range of unforeseen travel disruptions, including:

- **Trip Cancellation:** Reimbursement of up to \$2,500 for non-refundable expenses due to illness, injury, or other covered events occurring within 30 days of departure.
- **Trip Interruption & Replacement:** Up to \$2,500 for unused trip costs and expenses to send a replacement traveler if the original traveler must return early.
- **Trip Rearrangement:** Up to \$1,000 for reasonable costs to reschedule a disrupted trip due to events such as missed connections or lost travel documents.
- **Trip Delay:** Reimbursement of up to \$150 per 4-hour delay (maximum \$1,000) for expenses caused by mechanical issues, severe weather, or other qualifying disruptions.

Business Travel Insurance	
Insurance Company:	National Union Fire Insurance Company
A.M. Best Rating:	A (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027



Premium:	\$4,806
Limits	
Temporary Loss of Personal Property	\$1,000
Trip Cancellation	\$2,500 maximum
Trip Interruption/ Replacement	\$2,500 maximum
Trip Rearrangement	\$1,000 maximum
Trip Delay	150 for every full consecutive hour of delay, up to an overall maximum of \$1,000

DEADLY WEAPONS POLICY (WORKPLACE VIOLENCE RESPONSE COVERAGE)

The Deadly Weapons Policy provides specialized insurance protection and response services associated with workplace violence incidents involving a deadly weapon. The coverage supplements LACERA's existing insurance program by addressing expenses and organizational impacts that may not be covered under traditional property, liability, or employment-related insurance policies.

- Key Coverage Features
- Crisis management and incident response services
- Workplace violence response coordination
- Emergency communications support
- Counseling and trauma support services
- Recovery and rehabilitation assistance
- Certain first-party and third-party expenses arising from a covered incident
- Business interruption and operational disruption assistance, where covered
- Post-incident support and recovery resources

Deadly Weapons Policy	
Insurance Company:	Lloyd's of London
A.M. Best Rating:	A (Excellent), Financial Size Category: XV (Greater than or Equal to \$2 Billion)
Policy/Coverage Term:	June 30, 2026 to June 30, 2027
Premium:	\$5,209
Policy Limit:	\$500,000

FOR INFORMATION ONLY

July 20, 2026

TO: Each Trustee
Board of Retirement**FROM:** Ricki Contreras 
Administrative Services Division ManagerElsy Gutierrez 
Supervising Administrative Assistant II**FOR:** August 5, 2026, Board of Retirement Meeting**SUBJECT: Contracting Activity Report – June 2026**

The Board of Retirement (BOR) adopted the [Policy for the Procurement of Goods and Services \(PGS\)](#) on September 4, 2024, as revised by the BOR on February 4, 2026. 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 June 2026.

Category	Total	Approximate Dollar Amount
New Contracts	8	\$361,683.00
Renewals	6	\$124,855.00
Amendment	1	\$41,720.00
Extension	2	\$200,000.00
Total	17	\$479,155.00

Attachment

EG: eg

C: Luis Lugo, Chief Executive Officer
Jessica Baxter, Chief Administrative Officer
JJ Popowich, Chief Benefits Officer
Jon Gabel, Chief Investments Officer
Steven P. Rice, Chief Counsel
Leisha Collins, Chief Internal Audit
Carly Ntoya, Director of Human Resources

Summary of Contracting Activity: June 2026

Vendor	Division	Type	Term (Months)	New/Renewals	Total Contract Value
CDW Computer Centers, Inc.	Administrative Services	Equipment and Professional Services Agreement	12	N	\$3,802.00
General Networks Corporation	Communications	Consulting Services Agreement	12	N	\$38,070.00
CSG Systems, Inc.	Communications	Professional Services Agreement	24	N	\$600.00.00
SWG Associates	Human Resources	Employee Training and Education Services Agreement	12	N	\$5,000.00
Grant Thornton Advisors, LLC**	Internal Audit	Consulting Services Agreement	60	N	\$100,000.00
Klausner & Kaufman **					
Approved by the BOR on 4/1/2026 and BOI on 4/8/26	Legal	Legal Services Agreement	60	R	\$150,000.00
Eccentex Corporation	Systems	Professional Services Agreement	12	N	\$36,180.00
General Networks Corporation	Systems	Employee Training and Education Services Agreement	12	N	\$98,700.00
Forefront Technologies, LLC	Systems	Consulting Services Agreement	12	N	\$25,328.00
Team Solutions BMC Group	Systems	Software License Agreement	12	N	\$6,428.00
General Networks Corporation	Systems	Master Service Agreement	60	N	\$0.00
Chicago Soft*	Systems	Maintenance Service Agreement	12	R	\$7,620.00
Sublime HQ PTY LTD	Systems	Software License Agreement	12	R	\$152.00
Panic Inc.	Systems	Software License Agreement	12	R	\$25.00
Total					\$471,305.00

Vendor	Division	Type	Term (Months)	Amendment/Extension	Total Contract Value
The Center for Organizational Effectiveness	Human Resources	Employee Training and Education Master Services Agreement	24	A	\$0.00
Pinnacle Communication Services	Systems	Professional Services Agreement	1	A	\$4,425.00
Pinnacle Communication Services	Systems	Professional Services Agreement	1	A	\$3,425.00
Total					\$7,850.00

Legend

*Non-Competitive Procurements

** Contract executed by Business Owner

FOR INFORMATION ONLY

July 16, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services

FOR: August 5, 2026, Board of Retirement Meeting

SUBJECT: **4th Quarter Paid Invoice Summary & Threshold Report – April 1, 2026 to June 30, 2026**

On May 6, 2026, the Board of Retirement approved the termination of the Disability Retirement Services Approval of Service Provider Invoice Policy and replaced the prior individual invoice preapproval requirement with quarterly reporting of high-cost service provider invoices. This combined informational report provides the Board with a quarterly summary of paid invoice activity by service category, followed by threshold reporting for any vendor/case combinations exceeding the Board-established \$30,000 reporting threshold.

The service-category summary is intended to streamline the information provided to the Board by replacing the prior detailed line-item invoice level report, which varied in length depending on quarterly invoice volume, with a concise category-level overview that better aligns with the Board's oversight responsibilities. The threshold section then identifies any reportable vendor/case activity that exceeds \$30,000 per vendor/per case. For the reporting period ending June 30, 2026, one vendor/case met the reporting criteria and is included in this initial report under the revised quarterly reporting framework. The vendor/case has an updated cumulative expenditure total of \$47,400.16.

Because this is the first combined report using the revised format, it includes brief implementation context for the Board's reference. Future reports are expected to provide a streamlined quarterly summary of paid invoice activity by service category, new threshold items, and any additional payment activity for previously reported vendor/case combinations.

REVIEWED AND APPROVED:



JJ Popowich, Chief Benefits Officer

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

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

FOR INFORMATION ONLY

July 7, 2026

TO: Trustees – Board of Retirement

FROM: Jean J. Kim 
Senior Staff Counsel

DATE: Board of Retirement Meeting of August 5, 2026

SUBJECT: **REPORT OF REVISED PAY ITEM**

INTRODUCTION

This memorandum addresses the following existing pay item, for which the Board of Retirement (the “Board”) previously made a pensionability determination:

MOU Lump Sum Bonus: Court Interpreter Signing Bonus (Item No. 572)

As this pay item has been modified, staff has reviewed it to ensure that the prior legal analysis and pensionability determination are still applicable. For the reasons discussed below, the original legal analysis and the related pensionability determination regarding the pay item remain relevant and applicable to the revised pay item. Therefore, no additional Board determination is necessary.

A summary of the revised pay code is attached as Attachment A, and the analysis presented in support of the Board’s prior pensionability determination is attached as Attachment B.

BOARD AUTHORITY TO MAKE PENSIONABILITY DETERMINATIONS

The Board is charged with determining whether a pay item qualifies as pensionable under the County Employees Retirement Law of 1937 (“CERL”) and the California Public Employees’ Pension Reform Act of 2013 (“PEPRA”) and is therefore includable as final compensation in calculating a member’s retirement benefit. California Government Code (“Cal. Govt. Code”) §31461(a)(1) and §7522.34.

Items of compensation are analyzed as pensionable:

- for legacy members under the definition of “compensation earnable” in Cal. Govt. Code §31461; and
- for PEPRA members under the definition of “pensionable compensation” in Cal. Govt. Code §7522.34.

A “legacy member” refers to any individual who became a member of LACERA, or a reciprocal system, prior to January 1, 2013. A “PEPRA member” refers to anyone who first became a member of LACERA on or after January 1, 2013 and was not previously a member of another public retirement system prior to that date. Cal. Govt. Code §7522.04(f).

LEGAL ANALYSIS OF REVISED PAY ITEMS

MOU Lump Sum Bonus: Court Interpreter Signing Bonus (Item No. 572)

The MOU Lump Sum Bonus (Item No. 572) was originally created to provide a one-time lump sum payment to members of the Administrative Support Unit (BU 866) and the Supervisory Unit (BU 869). The original pensionability determination for this item was as follows:

- (1) Determined to qualify as compensation earnable for legacy members because although the bonus is a one-time payment, it is not excludable from compensation earnable because it is payable to all similarly situated members in the designated classifications.
- (2) Determined to not qualify as pensionable compensation for PEPRA members because it is a bonus that is paid in addition to the base pay or normal monthly rate of pay and is therefore excluded under Cal. Govt. Code §7522.34(c)(10). It is also a form of compensation that is inconsistent with the requirements of Cal. Govt. Code §7522.34(a) and is therefore excluded under Cal. Govt. Code §7522.34(c)(11).

This pay item is now being revised to extend eligibility to Superior Court Interpreters in Bargaining Unit 868. Since the only change has been to extend eligibility to an additional classification, there is no impact on the original pensionability analysis. Therefore, the revised pay item remains pensionable for legacy members and not pensionable for PEPRA members.

Trustees – Board of Retirement
July 7, 2026
Re: Report of Revised Pay Items
Page 3

The complete list of pay codes that have been determined by the Board to be pensionable or not pensionable under CERL (for legacy members) and under PEPRA (for PEPRA members) is located at <https://www.lacera.com/active-service/cerl-pay-codes> (for legacy members) and <https://www.lacera.com/active-service/pepra-pay-codes> (for PEPRA members).

Reviewed and Approved



Steven P. Rice
Chief Counsel

JJK/et

Revised Pay Codes

reviewed under Sections 31461 (CERL/Legacy) and 7522.34 (PEPRA)

Pay Event Code	Pay Event Title	Pay Event Description	Original Analysis (BOR Date)
INCLUDED under Section 31461 and EXCLUDED under 7522.34			
572	MOU LUMP SUM BONUS: COURT INTERPRETER SIGNING BONUS	This pay event is being revised to extend eligibility to Superior Court Interpreters in Bargaining Unit 868. Interpreters who are employed as of the first full pay period following the ratification date (April 22, 2026) of the Memorandum of Understanding will receive a one-time bonus payment of \$2,000. <u>Eligible Classifications</u> Interpreter – Regular, SC, Item No. 9887 (A-status) Interpreter – Daily, SC, Item No. 9920 (C-status) Interpreter – Hourly, SC, Item No. 9555 (F-status)	11/8/2012, 5/3/2023

Original Analysis of Pay Code 572 – MOU Lump Sum Bonus (Reviewed by BOR on 11/8/2012)

Attachment B: Pensionable Compensation EXCLUDED					
Resolution No. 12.002 Under Government Code Section 7522.34					
Event	Description	Interpretive Manual Description	7522.34 Reference	ANALYSIS	
572	MOU LUMP SUM BONUS	Used to make a one-time-only lump sum payment to certain employees as required by a negotiated MOU provision.	(c)(3)	(c)(3) One time payment as required by the MOU. This meets the definition of 7522.34 (c)(3) one-time or ad hoc payments. Therefore, the recommendation is to EXCLUDE this bonus.	According to negotiated MOU provisions the bonus is a one-time lump sum payment to certain employees

Original Analysis of Pay Code 572 – Superior Court Signing Bonus (Reviewed by BOR on 5/3/2023)

Attachment: Newly Created or Newly Revised Codes					
reviewed under Section 31461 and 7522.34					
Event	Description	Earnings Code Description	31461 Reference	7522.34 Reference	Analysis
Newly Created and INCLUDED under Section 31461 and EXCLUDED under 7522.34					
TBD 572	SIGNING BONUS (ADMINISTRATIVE SUPPORT UNIT AND SUPERVISORY UNIT)	Upon ratification of the successor MOU for 2023-2024, a one-time payment of \$1,500 is payable to bargaining unit members of the Administrative Support Unit (BU 866) and the Supervisory Unit (BU 869). Employees must be on the Court’s payroll as of March 5, 2023, and remain employed by the Court during the effective pay period to receive the payment.	(a)	(c)(3) (c)(10) (c)(11)	Although this bonus is considered a one-time or ad hoc payment made to a member, it is payable to all similarly situated members in the member’s grade or class. It was not created for the purpose of enhancing a member’s retirement benefit. Therefore, the recommendation is to INCLUDE this one-time payment in compensation earnable for LEGACY members. This one-time bonus constitutes a one-time or ad hoc payment under 7522.34 (c)(3) and a bonus paid in addition to the normal rate of base pay under (c)(10). It is a form of compensation that is inconsistent with the requirements of subdivision (a) under (c)(11). This one-time payment does not appear on a Public Pay Schedule. The recommendation is to EXCLUDE this one-time payment from pensionable compensation for PEPRAs members.

FOR INFORMATION ONLY

July 22, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Barry W. Lew 
Legislative Affairs Officer

FOR: August 5, 2026 Board of Retirement Meeting
August 12, 2026 Board of Investments 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. Bills from the 2025 legislative session that were enacted, vetoed, or died are no longer being tracked. Per requests from some trustees, the report now shows the complete timeline status of a bill.

Reviewed and Approved:



Cynthia Martinez
Chief, Communications

Attachments

LACERA Legislative Report Index
LACERA Legislative Report

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Jon Gabel
Scott Zdrazil

Scott Zdrazil
Tony Roda, Williams & Jensen
Naomi Padron, MKP Government Relations

CATEGORY	BILL	AUTHOR	TITLE	BOR POSITION	INDEX NUMBER
BROWN_ACT	AB 2498	Phillip Chen (R)	Exempt Surplus Land: Surplus Land		14
BROWN_ACT	AB 259	Blanca E. Rubio (D)	Open Meetings: Local Agencies: Teleconferences		1
BROWN_ACT	AB 409	Joaquin Arambula (D)	Open Meetings: Teleconferences: Community College		3
BROWN_ACT	AB 467	Mike Fong (D)	California Center for Climate Change Education		4
BROWN_ACT	SB 1159	Christopher Cabaldon (D)	Artificial Intelligence: Transparency and Governance		20
BROWN_ACT	SB 1187	Maria Elena Durazo (D)	Open Meetings		21
BROWN_ACT	SB 239	Jesse Arreguin (D)	Crimes: Criminal Threats		17
PUBLIC_EMPLOYMENT	AB 1564	Patrick Ahrens (D)	Employer-employee relations: Confidential Communication		8
PUBLIC_EMPLOYMENT	AB 340	Patrick Ahrens (D)	Employer-Employee Relations: Confidential Communication		2
PUBLIC_EMPLOYMENT	SB 1207	John Laird (D)	California Conservation Corps		22
PUBLIC_INVESTMENT	AB 1439	Robert Garcia (D)	Public Retirement Systems: Labor Standards		7
PUBLIC_INVESTMENT	SB 1319	Maria Elena Durazo (D)	California Public Records Act: Public Investment Funds		23
PUBLIC_RETIREMENT	AB 1054	Mike A. Gipson (D)	Public Employees Retirement: Deferred Retirement Option		5
PUBLIC_RETIREMENT	AB 1383	Tina McKinnor (D)	Public Employees Retirement Benefits	Watch	6
PUBLIC_RETIREMENT	AB 1601	Chris Rogers (D)	County Employees' Retirement: Cost-of-Living Adjustment		9
PUBLIC_RETIREMENT	AB 1619	Avelino Valencia (D)	Public Employees' Retirement: Administration	Support If Amended	10
PUBLIC_RETIREMENT	AB 1660	Pilar Schiavo (D)	Public Guardians and Public Administrators		11
PUBLIC_RETIREMENT	AB 1844	Blanca Pacheco (D)	Judges Retirement System II: Beneficiaries		12
PUBLIC_RETIREMENT	AB 2336	Alexandra Macedo (R)	Personal Income Tax Law: Exclusions from Income		13
PUBLIC_RETIREMENT	AB 2780	Public Employment and Retirement	Public Employees' Retirement	Support	15
PUBLIC_RETIREMENT	ACA 2	Corey Jackson (D)	Legislature: Retirement		16
PUBLIC_RETIREMENT	SB 538	Megan Dahle (R)	Public Employees' Retirement System: Teaching		18
PUBLIC_RETIREMENT	SB 850	Angelique Ashby (D)	Prisons		19
SOCIAL_SECURITY	HR 1700	Valerie Hoyle (D)	Social Security Benefits		25
SOCIAL_SECURITY	HR 904	Jeff Van Drew (R)	Gross Income SS Benefit Inclusion Repeal		24
SOCIAL_SECURITY	S 1504	Bill Cassidy (R)	Social Security Administration		27
SOCIAL_SECURITY	S 1505	Bill Cassidy (R)	Social Security Beneficiaries		28
SOCIAL_SECURITY	S 770	Bernard Sanders (I)	Social Security Benefits		26

1.

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.
May 5, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Apr 22, 2025: In ASSEMBLY. Read second time. To third reading.
Apr 21, 2025: In ASSEMBLY. Read second time and amended. To second reading.
Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.
Feb 10, 2025: To ASSEMBLY Committee on LOCAL GOVERNMENT.
Jan 16, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Audio/Video Tapes and Recorders

Public Information, Meetings Access

[+ Show more](#)

2.

California Assembly Bill 340 (2025-2026)

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

Aug 29, 2025: In SENATE Committee on APPROPRIATIONS: Held in committee.
Aug 18, 2025: In SENATE Committee on APPROPRIATIONS: To Suspense File.
July 15, 2025: From SENATE Committee on JUDICIARY: Do pass to Committee on APPROPRIATIONS.
June 25, 2025: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on JUDICIARY.
June 18, 2025: To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and JUDICIARY.
June 3, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 27, 2025: In ASSEMBLY. Read second time. To third reading.
May 23, 2025: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
Apr 23, 2025: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.
Mar 19, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Mar 5, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 5, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
Feb 18, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Jan 28, 2025: INTRODUCED.

- [Collapse status history](#)

Topics:

Privacy- Misc

Privileged Communications

Collective Bargaining and Unions [Public Sector]

[+ Show more](#)

3.

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.

May 21, 2025: To SENATE Committees on LOCAL GOVERNMENT and EDUCATION.

May 12, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Apr 24, 2025: In ASSEMBLY. Read second time. To third reading.

Apr 22, 2025: From ASSEMBLY Committee on HIGHER EDUCATION: Do pass.

Apr 10, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on HIGHER EDUCATION.

Apr 10, 2025: From ASSEMBLY Committee on HIGHER EDUCATION with author's amendments.

Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass to Committee on HIGHER EDUCATION.

Feb 18, 2025: To ASSEMBLY Committees on LOCAL GOVERNMENT and HIGHER EDUCATION.

Feb 4, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Audio/Video Tapes and Recorders

Public Information, Meetings Access

[+ Show more](#)

4.

California Assembly Bill 467 (2025-2026)

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

California Center for Climate Change Education

 AI-generated

This bill codifies the establishment of the California Center for Climate Change Education within the Los Angeles Community College District, located at West Los Angeles College. The center's mission is to promote climate change education at the California Community Colleges and establish opportunities for students to engage in hands-on internships and other learning opportunities. The bill also makes legislative findings regarding climate change, environmental equity, and the unique circumstances of the Los Angeles Community College District.

[Show more](#) 

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Code:

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

An act to add Article 7.5 (commencing with Section 78085) to Chapter 1 of Part 48 of Division 7 of Title 3 of the Education Code, relating to public postsecondary education.

Status:

July 1, 2026: From SENATE Committee on EDUCATION: Do pass to Committee on APPROPRIATIONS.

June 18, 2026: Re-referred to SENATE Committees on EDUCATION and APPROPRIATIONS.

June 10, 2026: Re-referred to SENATE Committee on RULES.

June 10, 2026: Withdrawn from SENATE Committee on LOCAL GOVERNMENT.

June 9, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.

June 9, 2026: From SENATE Committee on LOCAL GOVERNMENT with author's amendments.

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

May 5, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Apr 22, 2025: In ASSEMBLY. Read second time. To third reading.

Apr 21, 2025: In ASSEMBLY. Read second time and amended. To second reading.

Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.

Feb 18, 2025: To ASSEMBLY Committee on LOCAL GOVERNMENT.

Feb 6, 2025: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Appropriations

Topics:

Local School Districts and Boards

Junior, Community Colleges

Postsecondary Education Finance

[+ Show more](#)

5.

California Assembly Bill 1054 (2025-2026)

CAA 1054 | [Mike A. Gipson \(D-065\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |
Senate Appropriations Committee

Public Employees Retirement: Deferred Retirement Option

 AI-generated

This bill establishes a voluntary Deferred Retirement Option Program within the Public Employees' Retirement System for eligible peace officer members of State Bargaining Unit 5 (California Highway Patrol) and firefighter members of State Bargaining Unit 8 (CAL FIRE). The program allows qualifying members who are eligible for service retirement to continue employment for up to 60 consecutive months while accruing a lump-sum benefit in a program account, payable upon termination and retirement. The program is intended to address recruitment and retention challenges at CHP and CAL FIRE by keeping experienced personnel actively employed.

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Code:

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

Status:

- June 25, 2026:** In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
- June 24, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.
- May 6, 2026:** To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
- Jan 26, 2026:** In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
- Jan 22, 2026:** In ASSEMBLY. Read second time. To third reading.
- Jan 22, 2026:** In ASSEMBLY. Assembly Rule 63 suspended.
- Jan 22, 2026:** From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
- Jan 22, 2026:** In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.
- Jan 14, 2026:** In ASSEMBLY. Coauthors revised.
- Jan 14, 2026:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Jan 5, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 5, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

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.

Feb 20, 2025: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Appropriations

Topics:

Collective Bargaining and Unions [Public Sector]

Public Employee Retirement Systems

Public Employee Benefits- Other

[+ Show more](#)

6.

California Assembly Bill 1383 (2025-2026)

CAA 1383 | [Tina McKinnor \(D-061\)](#) and 22 Co-sponsors | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Appropriations Committee

Public Employees Retirement Benefits

 AI-generated

This bill addresses public employees' retirement benefits under the California Public Employees' Pension Reform Act of 2013 (PEPRA). It modifies the pensionable compensation limits and defined benefit formulas applicable to new members of public retirement systems, with a focus on safety members such as firefighters and law enforcement personnel. The bill also authorizes public employers and recognized employee organizations to collectively bargain over retirement benefit formulas for safety members.

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Code:

An act to amend Sections 7522.02, 7522.10, 7522.15, 7522.25, and 20516 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:

- July 1, 2026:** In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
- July 1, 2026:** From SENATE Committee on APPROPRIATIONS with author's amendments.
- June 24, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
- May 13, 2026:** In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
- May 13, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.
- May 6, 2026:** To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
- Jan 29, 2026:** In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
- Jan 26, 2026:** In ASSEMBLY. Read second time. To third reading.
- Jan 22, 2026:** In ASSEMBLY. Read second time and amended. To second reading.
- Jan 22, 2026:** In ASSEMBLY. Assembly Rule 63 suspended.
- Jan 22, 2026:** From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.

May 25, 2025: In ASSEMBLY. Coauthors revised.

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

May 14, 2025: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Apr 23, 2025: In ASSEMBLY. Coauthors revised.

Apr 23, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Apr 11, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 11, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 10, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 10, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 10, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 21, 2025: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Appropriations

Topics:

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

Public Employee Benefits- Other

[+ Show more](#)

7.

California Assembly Bill 1439 (2025-2026)

CAA 1439 | [Robert Garcia \(D-050\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |
Senate Appropriations Committee

Public Retirement Systems: Labor Standards

 AI-generated

This bill adds a new section to the Government Code concerning labor standards protections in California real estate and infrastructure development projects funded through the real asset portfolios of the Public Employees' Retirement System (PERS) and the State Teachers' Retirement System (STRS). The Legislature requests the University of California, Berkeley, Labor Center to conduct an independent study analyzing the extent of such protections and their impact on California workers, the state's economy, development costs, and project completion timelines.

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Code:

An act to add Section 7513.77 to the Government Code, relating to public retirement systems.

Status:

June 22, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

June 11, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.

June 2, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

June 2, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 29, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Jan 26, 2026: In ASSEMBLY. Read second time. To third reading.

Jan 22, 2026: In ASSEMBLY. Read second time and amended. To second reading.

Jan 22, 2026: In ASSEMBLY. Assembly Rule 63 suspended.

Jan 22, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.

Jan 22, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Jan 14, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

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.

Feb 21, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Real Estate Records

Universities and Colleges- Public

Labor and Employment- Other

[+ Show more](#)

8.

California Assembly Bill 1564 (2025-2026)

CAA 1564 | [Patrick Ahrens \(D-026\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |
Senate Appropriations Committee

Employer-employee relations: Confidential Communication

 AI-generated

This bill addresses employer-employee relations for public sector workers in California. The bill prohibits public employers from questioning public employees or their union representatives about confidential communications made in connection with representation on matters within the scope of the employee organization's representation. The bill also prohibits compelling disclosure of such confidential communications to third parties.

[Show more](#) ▾

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Code:

An act to add Section 3558.9 to the Government Code, relating to employer-employee relations.

Status:

- June 30, 2026:** From SENATE Committee on JUDICIARY: Do pass to Committee on APPROPRIATIONS.
- June 24, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on JUDICIARY.
- June 22, 2026:** To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and JUDICIARY.
- June 22, 2026:** In SENATE. Joint Rule 62(a) suspended.
- May 26, 2026:** In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
- May 19, 2026:** In ASSEMBLY. Read second time. To third reading.
- May 18, 2026:** In ASSEMBLY. Read second time and amended. To second reading.
- May 14, 2026:** From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.
- May 14, 2026:** In ASSEMBLY. Joint Rule 62(a) suspended.
- May 6, 2026:** In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.
- Mar 18, 2026:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
- Feb 26, 2026:** Re-referred to ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 26, 2026: In ASSEMBLY. Suspend Assembly Rule 96.
Feb 25, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on BUSINESS AND PROFESSIONS.
Feb 25, 2026: From ASSEMBLY Committee on BUSINESS AND PROFESSIONS with author's amendments.
Feb 2, 2026: To ASSEMBLY Committee on BUSINESS AND PROFESSIONS.
Jan 12, 2026: INTRODUCED.
[- Collapse status history](#)

Hearing Dates:

08/03/2026 Appropriations

Topics:

Privacy- Misc

Privileged Communications

K-12 Education- Misc

[+ Show more](#)

9.

California Assembly Bill 1601 (2025-2026)

CAA 1601 | [Chris Rogers \(D-002\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |
Senate Third Reading File

County Employees' Retirement: Cost-of-Living Adjustment

Permits the county board of supervisors for Sonoma County to authorize a cost-of-living adjustment to the retirement allowances, optional death allowances, or annual death allowances payable by the retirement system. Requires the board of supervisors to take actions, including collaborating with the retirement board to identify the eligible retired members, survivors, beneficiaries, or successors in interest designated, or a subset of those benefit recipients, to receive the cost-of-living adjustment.

Code:

An act to add Section 31874.7 to the Government Code, relating to public employees' retirement.

Status:

June 11, 2026: In SENATE. Read second time. To third reading.
June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass.
May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 16, 2026: In ASSEMBLY. Read third time. Adopted by ASSEMBLY. *****To SENATE.
Apr 9, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 8, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass.
Feb 2, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Jan 16, 2026: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Senate Third Reading File

Topics:

Public Employee Retirement Systems

Public Employee Benefits- Other

Local Government Elected and Appointed Officials

10.

California Assembly Bill 1619 (2025-2026)

CAA 1619 | [Avelino Valencia \(D-068\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |
Senate Third Reading File

Public Employees' Retirement: Administration

 AI-generated

This bill addresses public employees' retirement administration by modifying compensation rates for certain board members of retirement systems. The bill affects the State Teachers' Retirement System, the Public Employees' Retirement System, and county retirement systems established under the County Employees Retirement Law of 1937. The bill changes the per-meeting compensation for specified board members from one hundred dollars to three hundred twenty dollars.

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Code:

An act to amend Section 22223 of the Education Code, and to amend ~~Section 31521~~ Sections 20091, 31521, and 31521.1 of the Government Code, relating to public employees' retirement.

Status:

June 30, 2026: In SENATE. Read second time. To third reading.
June 29, 2026: From SENATE Committee on APPROPRIATIONS: To second reading without further hearing pursuant to Senate Rule 28.8.
June 17, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
June 3, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
May 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 14, 2026: In ASSEMBLY. Read second time. To third reading.
May 13, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
Apr 27, 2026: Re-referred to ASSEMBLY Committee on APPROPRIATIONS.
Apr 27, 2026: In ASSEMBLY. Joint Rule 10.5 suspended.
Apr 27, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 23, 2026: In ASSEMBLY. Read second time and amended. To second reading.
Apr 22, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended.
Feb 2, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 21, 2026: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Senate Third Reading File

Topics:

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

Public Employees- Misc

[+ Show more](#)

11.

California Assembly Bill 1660 (2025-2026)

CAA 1660 | [Pilar Schiavo \(D-040\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |
Senate Third Reading File

Public Guardians and Public Administrators

 AI-generated

This bill amends the California Probate Code to modify the authority and procedures governing public guardians, public conservators, and public administrators in taking possession or control of property. The bill addresses the form and validity period of written certifications issued by these officials and establishes enforcement mechanisms for non-compliance by financial institutions and other persons.

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Code:

An act to amend Sections 2901, 2901.5, 7603, and 7660 of the Probate Code, relating to probate.

Status:

June 25, 2026: In SENATE. Read second time and amended. To third reading.
June 23, 2026: From SENATE Committee on JUDICIARY: Do pass as amended.
June 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on JUDICIARY.
June 15, 2026: From SENATE Committee on JUDICIARY with author's amendments.
May 13, 2026: To SENATE Committee on JUDICIARY.
May 4, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Apr 13, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 9, 2026: In ASSEMBLY. Read second time and amended. To second reading.
Apr 8, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.
Mar 12, 2026: Re-referred to ASSEMBLY Committee on APPROPRIATIONS.
Mar 11, 2026: In ASSEMBLY. Read second time. To third reading.
Mar 10, 2026: From ASSEMBLY Committee on JUDICIARY: Do pass.
Feb 17, 2026: To ASSEMBLY Committee on JUDICIARY.
Jan 29, 2026: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Senate Third Reading File

Topics:

Privacy- Misc

Government Records

Real Estate Records

[+ Show more](#)

12.

California Assembly Bill 1844 (2025-2026)

CAA 1844 | [Blanca Pacheco \(D-064\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (No) |
Senate Appropriations Committee

Judges Retirement System II: Beneficiaries

 AI-generated

This bill amends provisions of the Judges' Retirement System II relating to beneficiary designations and survivor benefits. For judges retiring on or after January 1, 2027, the bill authorizes designation of a non-spouse beneficiary to receive retirement allowance payments after the judge's death, subject to community property rights of the judge's spouse. The bill also clarifies the scope of existing optional settlement provisions and modifies eligibility requirements for certain survivor allowances.

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Code:

An act to amend Sections 75522, 75522.5, 75570, 75570.5, 75571.5, 75590, and 75591 of, and to add ~~Section~~ Sections 75571.7 and 75574 to, the Government Code, relating to judges' retirement.

Status:

June 22, 2026: In SENATE Committee on APPROPRIATIONS: Not heard.
June 11, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.
May 6, 2026: To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and APPROPRIATIONS.
Mar 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Mar 23, 2026: In ASSEMBLY. Read second time. To third reading.
Mar 19, 2026: In ASSEMBLY. Read second time and amended. To second reading.
Mar 18, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended.
Feb 23, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Feb 11, 2026: INTRODUCED.

[- Collapse status history](#)

Hearing Dates:

08/03/2026 Appropriations

Topics:

Public Employee Retirement Systems

Public Employee Benefits- Other

Community, Separate Property

[+ Show more](#)

13.

California Assembly Bill 2336 (2025-2026)

CA A 2336 | [Alexandra Macedo \(R-033\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Revenue and Taxation Committee

Personal Income Tax Law: Exclusions from Income

Excludes under the Personal Income Tax Law, for taxable years beginning on or after January 1, 2026, and before January 1, 2031, from gross income the first \$25,000 of overtime pay received by a taxpayer during the taxable year. Excludes from gross income the first \$25,000 received by a taxpayer as proceeds from a defined benefit plan, as defined.

Code:

An act to add and repeal Sections 17147 and 17147.1 of the Revenue and Taxation Code, relating to taxation, to take effect immediately, tax levy.

Status:

Apr 27, 2026: In ASSEMBLY Committee on REVENUE AND TAXATION: Held in committee.

Apr 13, 2026: In ASSEMBLY Committee on REVENUE AND TAXATION: To Suspense File.

Mar 9, 2026: To ASSEMBLY Committee on REVENUE AND TAXATION.

Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Retirement Plans [Private Sector]

Wages and Hours [Private Sector]

Public Employee Wages and Hours

[+ Show more](#)

14.

California Assembly Bill 2498 (2025-2026)

CAA 2498 | Phillip Chen (R-059) | Pending | Fiscal Committee (No) | Urgency Clause (No) | Assembly Local Government Committee

Exempt Surplus Land: Surplus Land

AI-generated

This bill proposes to amend Section 54221 of the Government Code relating to local government surplus land disposal. The bill addresses the definition of exempt surplus land and specifically clarifies what constitutes valid legal restrictions. The amendment specifies that option agreement requirements are included among contractual obligations that can make surplus land exempt from certain disposal requirements.

Show more

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Code:

~~An act to amend Section 54952.2 of the Government Code, relating to local government.~~

An act to amend Section 54221 of the Government Code, relating to local government.

Status:

- Mar 19, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
- Mar 19, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.
- Mar 19, 2026: To ASSEMBLY Committees on LOCAL GOVERNMENT and HOUSING AND COMMUNITY DEVELOPMENT.
- Feb 20, 2026: INTRODUCED.

- Collapse status history

Topics:

Agencies- Misc

State and Federal Lands

Local Lands, Buildings and Monuments

+ Show more

15.

California Assembly Bill 2780 (2025-2026)

CA A 2780 | Public Employment and Retirement | Pending | Fiscal Committee (Yes) | Urgency Clause (No)
| Senate Third Reading File

Public Employees' Retirement

 AI-generated

This bill amends various provisions of the Education Code and Government Code relating to public employee retirement systems, including the State Teachers' Retirement System (STRS), the Public Employees' Retirement System (PERS), and retirement systems established under the County Employees Retirement Law of 1937. The bill addresses definitions, member contribution rules, investment standards, benefit calculations, and board composition. It also makes changes to state safety member classifications and creates new statutory obligations for county retirement systems.

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Code:

An act to amend Sections 22170.5, 22250, 22455.5, 24201.5, 24204, 24209, 24209.3, 24210, 25006, 25009, 26300, and 26606 of, and to amend, repeal, and add Sections 22164.5, 26004, 26113, 26135.7, 26139, and 26139.5 of, the Education Code, and to amend Sections 20405, 20407, 20408, 20409, 20410, 21023.5, 31520, 31520.1, 31520.2, 31621.7, 31622, 31639.3, 31641, 31641.2, 31641.6, 31641.20, 31641.21, and 31835 of, to repeal Section 20411 of, and to add Sections 31540.5 and 31789.6 to, the Government Code, relating to retirement, and making an appropriation therefor.

Status:

- July 2, 2026:** In SENATE. From Consent Calendar. To third reading.
- July 2, 2026:** In SENATE. Read second time. To Consent Calendar.
- June 29, 2026:** From SENATE Committee on APPROPRIATIONS: To 2nd Reading without hearing pursuant to Senate Rule 28.8 and to Consent.
- June 17, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
- June 4, 2026:** In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
- June 4, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

May 20, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
May 11, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 7, 2026: In ASSEMBLY. Read second time. To third reading.
May 6, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
Apr 22, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Apr 20, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 20, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
Mar 16, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 9, 2026: INTRODUCED.
[- Collapse status history](#)

Hearing Dates:

08/03/2026 Senate Third Reading File

Topics:

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

Public Employees- Employment Practices- Misc

[+ Show more](#)

16.

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.

Topics:

Public Employee Retirement Systems Legislative/Congressional Rules and Procedures

Legislators/Congresspersons and Staff + [Show more](#)

17.

California Senate Bill 239 (2025-2026)

CAS 239 | [Jesse Arreguin \(D-007\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Assembly Appropriations Committee

Crimes: Criminal Threats

 AI-generated

This bill amends the Penal Code provision governing criminal threats to modify the sentencing factors applicable to felony violations. Specifically, it addresses the aggravating factors a court may consider when sentencing a defendant convicted of a felony criminal threat, adding certain local officials to the list of protected persons.

[Show more](#) ▾

 AI-generated content should be reviewed for accuracy.

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Code:

An act to amend Section 422 of the Penal Code, relating to crimes.

Status:

July 2, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

June 30, 2026: From ASSEMBLY Committee on PUBLIC SAFETY: Do pass as amended to Committee on APPROPRIATIONS.

June 17, 2026: In SENATE. Read second time and amended. Re-referred to Committee on PUBLIC SAFETY.

June 17, 2026: From SENATE Committee on PUBLIC SAFETY with author's amendments.

June 1, 2026: Re-referred to ASSEMBLY Committee on PUBLIC SAFETY.

June 1, 2026: In ASSEMBLY. Suspend Assembly Rule 96.

May 28, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.

May 28, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.

May 11, 2026: To ASSEMBLY Committee on LOCAL GOVERNMENT.

Jan 27, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

Jan 26, 2026: In SENATE. Read second time. To third reading.

Jan 22, 2026: In SENATE. From Inactive File. To second reading.

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

May 8, 2025: In SENATE. Read second time. To third reading.
May 6, 2025: From SENATE Committee on JUDICIARY: Do pass.
Apr 7, 2025: In SENATE. Read second time and amended. Re-referred to Committee on JUDICIARY.
Apr 2, 2025: From SENATE Committee on LOCAL GOVERNMENT: Do pass as amended to Committee on JUDICIARY.
Feb 14, 2025: To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.
Jan 30, 2025: INTRODUCED.
[- Collapse status history](#)

Topics:

Birth, Death, Marriage, Divorce Records

Courts- Misc

Criminal Law- Misc

[+ Show more](#)

18.

California Senate Bill 538 (2025-2026)

CAS 538 | [Megan Dahle \(R-001\)](#) | Failed | Fiscal Committee (Yes) | Urgency Clause (No) | SENATE

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:

Feb 2, 2026: In SENATE. Returned to Secretary of Senate pursuant to Joint Rule 56.
Mar 5, 2025: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Feb 20, 2025: INTRODUCED.
[- Collapse status history](#)

Topics:

Teachers- Misc

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

[+ Show more](#)

19.

California Senate Bill 850 (2025-2026)

CAS 850 | [Angelique Ashby \(D-008\)](#) | Failed | Fiscal Committee (Yes) | Urgency Clause (No) | SENATE

Prisons

Requires a correctional officer or other prison staff member employed by the Department of Corrections and Rehabilitation who is a current member of a public retirement system, convicted of sexually assaulting an inmate within the prison system, to forfeit all rights and benefits in the retirement system. Requires an officer or staff member who first becomes a member of a system on or after the specified date, who is convicted of sexually assaulting an inmate, to forfeit all rights and benefits.

Code:

An act to add Section 7522.75 to the Government Code, and to add Section 5030 to, and to add Article 8 (commencing with Section 2049) to Chapter 1 of Title 1 of Part 3 of, the Penal Code, relating to prisons.

Status:

Feb 2, 2026: In SENATE. Returned to Secretary of Senate pursuant to Joint Rule 56.

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

May 19, 2025: In SENATE Committee on APPROPRIATIONS: To Suspense File.

May 7, 2025: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

Apr 30, 2025: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.

Apr 29, 2025: From SENATE Committee on PUBLIC SAFETY: Do pass to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 23, 2025: Re-referred to SENATE Committees on PUBLIC SAFETY and LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 21, 2025: Re-referred to SENATE Committee on RULES.

Apr 21, 2025: Withdrawn from SENATE Committee on PUBLIC SAFETY.

Apr 21, 2025: In SENATE. Read second time and amended. Re-referred to Committee on PUBLIC SAFETY.

Apr 21, 2025: From SENATE Committee on PUBLIC SAFETY with author's amendments.

Mar 12, 2025: To SENATE Committee on PUBLIC SAFETY.

Feb 21, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Public Employee Retirement Systems

Public Employees- Misc

Public Employee Benefits- Other

[+ Show more](#)

20.

California Senate Bill 1159 (2025-2026)

CAS 1159 | [Christopher Cabaldon \(D-003\)](#) and 8 Co-sponsors | Pending | Fiscal Committee (No) | Urgency Clause (No) | Assembly Second Reading File

Artificial Intelligence: Transparency and Governance

 AI-generated

This bill addresses the role of artificial intelligence in California's governmental transparency and governance processes. It clarifies that AI systems, autonomous agents, and robots do not qualify as a 'person' or any similar term under several major California transparency laws, including the California Public Records Act, the Ralph M. Brown Act, the Bagley-Keene Open Meeting Act, the Administrative Procedure Act, CEQA, and the California Coastal Act of 1976. The bill also prohibits the knowing use of AI to falsely represent that a natural person engaged with a governmental agency.

[Show more](#) 

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Code:

An act to amend Sections 7920.520, 9072, 11405.70, and 11500 of, and to add Sections 8319, 11121.5, 11342.575, 11370.1.5, and 54951.5 to, the Government Code, and to amend Sections 21066 and 30111 of the Public Resources Code, relating to artificial intelligence.

Status:

- June 30, 2026:** From ASSEMBLY Committee on JUDICIARY: Do pass.
- June 25, 2026:** In ASSEMBLY. Read second time and amended. Re-referred to Committee on JUDICIARY.
- June 23, 2026:** From ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION: Do pass as amended to Committee on JUDICIARY.
- June 9, 2026:** In ASSEMBLY. Read second time and amended. Re-referred to ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION.
- June 9, 2026:** From ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION with author's amendments.
- May 18, 2026:** To ASSEMBLY Committees on PRIVACY AND CONSUMER PROTECTION and JUDICIARY.
- May 4, 2026:** In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
- Apr 8, 2026:** In SENATE. Read second time. To third reading.
- Apr 7, 2026:** In SENATE. Ordered to second reading.

Apr 7, 2026: Withdrawn from SENATE Committee on APPROPRIATIONS.

Apr 6, 2026: From SENATE Committee on PRIVACY, DIGITAL TECHNOLOGIES, AND CONSUMER PROTECTION: Do pass to Committee on APPROPRIATIONS.

Mar 25, 2026: In SENATE. Read second time & amended. Re-referred to the Committee on PRIVACY, DIGITAL TECHNOLOGIES & CONSUMER PROTECTION

Mar 24, 2026: From SENATE Committee on JUDICIARY: Do pass as amended to Committee on PRIVACY, DIGITAL TECHNOLOGY AND CONSUMER PROTECTION

Mar 4, 2026: To SENATE Committees on JUDICIARY and PRIVACY, DIGITAL TECHNOLOGIES, AND CONSUMER PROTECTION.

Feb 18, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Public Information, Meetings Access

Environmental Impact Reports [EIRs]

[+ Show more](#)

21.

California Senate Bill 1187 (2025-2026)

CAS 1187 | [Maria Elena Durazo \(D-026\)](#) | Pending | Fiscal Committee (No) | Urgency Clause (Yes) | Assembly Second Reading File

Open Meetings

 AI-generated

This bill amends Section 54953.4 of the Government Code, which governs open meeting requirements for local agencies under the Ralph M. Brown Act. The bill removes certain requirements that were scheduled to take effect July 1, 2026, while retaining requirements for remote public access to meetings. The bill is declared an urgency statute, taking effect immediately.

[Show more](#) 

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Code:

An act to amend Section 54953.4 of the Government Code, relating to local ~~government.~~
government, and declaring the urgency thereof, to take effect immediately.

Status:

July 6, 2026: In ASSEMBLY. Read second time and amended. To second reading.
July 1, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.
June 22, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
June 22, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.
May 18, 2026: To ASSEMBLY Committee on LOCAL GOVERNMENT.
May 7, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
Apr 30, 2026: In SENATE. Read second time. To Consent Calendar.
Apr 29, 2026: From SENATE Committee on LOCAL GOVERNMENT: Do pass. To Consent Calendar.
Mar 4, 2026: To SENATE Committee on LOCAL GOVERNMENT.
Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Public Information, Meetings Access

Legislative/Congressional Rules and Procedures

[+ Show more](#)

22.

California Senate Bill 1207 (2025-2026)

CAS 1207 | [John Laird \(D-017\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) |
Assembly Appropriations Committee

California Conservation Corps

 AI-generated

This bill amends various provisions relating to the California Conservation Corps. The bill modifies the corps' mission statements, project requirements, and contracting authority, particularly regarding wildfire prevention and forest resiliency projects. The bill also allows Public Employees' Retirement System members to receive service credit for corps service and exempts corpsmembers from certain wage and hour regulations.

[Show more](#) ▾

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Code:

An act to amend Section 21023.5 of the Government Code, to amend Section 1171 of the Labor Code, and to amend Sections 14000, 14300, 14303, 14304, 14310, 14315, 14318, 14400, ~~and 14415~~ 14415, and 14424 of, to repeal Section 14308 of, and to repeal Chapter 3.2 (commencing with Section 14350) of Division 12 of, the Public Resources Code, relating to the California Conservation Corps, and making an appropriation therefor.

Status:

- June 24, 2026:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
- June 8, 2026:** From ASSEMBLY Committee on NATURAL RESOURCES: Do pass to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
- May 26, 2026:** To ASSEMBLY Committees on NATURAL RESOURCES and PUBLIC EMPLOYMENT AND RETIREMENT.
- May 7, 2026:** In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
- May 5, 2026:** In SENATE. Read second time. To Consent Calendar.
- May 4, 2026:** From SENATE Committee on APPROPRIATIONS: To 2nd Reading without hearing pursuant to Senate Rule 28.8 and to Consent.
- Apr 22, 2026:** From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Apr 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 15, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

Apr 14, 2026: From SENATE Committee on NATURAL RESOURCES AND WATER: Do pass to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 8, 2026: Re-referred to SENATE Committees on NATURAL RESOURCES AND WATER and LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 23, 2026: In SENATE. Read second time and amended. Re-referred to Committee on RULES.

Mar 23, 2026: From SENATE Committee on RULES with author's amendments.

Mar 4, 2026: To SENATE Committee on RULES.

Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Environmental Agencies and Personnel- Misc

Environmental Quality- Misc

Environmental Trust Funds/Loans/Grants

[+ Show more](#)

23.

California Senate Bill 1319 (2025-2026)

CAS 1319 | [Maria Elena Durazo \(D-026\)](#) | Pending | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Appropriations Committee

California Public Records Act: Public Investment Funds

 AI-generated

This bill amends the California Public Records Act regarding disclosure requirements for alternative investments made by public investment funds. The bill modifies what information must be disclosed to the public about alternative investment vehicles while maintaining exemptions for certain proprietary records. The bill adds new disclosure requirements and clarifies existing exemptions for records containing portfolio position information.

[Show more](#) 

 AI-generated content should be reviewed for accuracy.

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Code:

An act to amend Section 7928.710 of the Government Code, relating to public records.

Status:

May 14, 2026: In SENATE Committee on APPROPRIATIONS: Held in committee.
May 4, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.
Apr 22, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Apr 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 15, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.
Apr 14, 2026: From SENATE Committee on JUDICIARY: Do pass to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 8, 2026: Re-referred to SENATE Committees on JUDICIARY and LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 25, 2026: In SENATE. Read second time and amended. Re-referred to Committee on RULES.
Mar 25, 2026: From SENATE Committee on RULES with author's amendments.
Mar 4, 2026: To SENATE Committee on RULES.
Feb 20, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Public Information, Meetings Access

Deposits- Public Funds

Investments- Misc

24.

United States House Bill 904 (2025-2026)

US H 904 | [Jeff Van Drew \(R-NJ 02\)](#) and 2 Co-sponsors | Pending | House Ways and Means Committee

Gross Income SS Benefit Inclusion Repeal

Amends the Internal Revenue Code of 1986 to repeal the inclusion in gross income of Social Security benefits.

Status:

Jan 31, 2025: To HOUSE Committee on WAYS AND MEANS.

Jan 31, 2025: INTRODUCED.

[- Collapse status history](#)

Related:

[USS 2716](#)

Topics:

Social Security

Tax Issues- Misc

25.

United States House Bill 1700 (2025-2026)

US H 1700 | [Valerie Hoyle \(D-OR 04\)](#) and 36 Co-sponsors | Pending |
House Transportation & Infrastructure Committee

Social Security Benefits

Enhances Social Security benefits and ensure the long-term solvency of the Social Security program.

Status:

Feb 27, 2025: To HOUSE Committee on TRANSPORTATION AND INFRASTRUCTURE.

Feb 27, 2025: To HOUSE Committee on EDUCATION AND THE WORKFORCE.

Feb 27, 2025: To HOUSE Committee on WAYS AND MEANS.

Feb 27, 2025: INTRODUCED.

[- Collapse status history](#)

Identical:

[US S 770](#)

Related:

[US S 4196](#)

Topics:

Social Security

26.

United States Senate Bill 770 (2025-2026)

USS 770 | [Bernard Sanders \(I-VT\)](#) and 10 Co-sponsors | Pending | Senate Finance Committee

Social Security Benefits

Enhances Social Security benefits and ensure the long-term solvency of the Social Security program.

Status:

Feb 27, 2025: To SENATE Committee on FINANCE.

Feb 27, 2025: In SENATE. Read second time.

Feb 27, 2025: INTRODUCED.

[- Collapse status history](#)

Identical:

[US H 1700](#)

Related:

[USS 4196](#)

Topics:

Social Security

27.

United States Senate Bill 1504 (2025-2026)

USS 1504 | [Bill Cassidy \(R-LA\)](#) and 13 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.

[- Collapse status history](#)

Identical:

[US H 5284](#)

Topics:

Social Security

Social Services Agencies

Regulatory Process

28.

United States Senate Bill 1505 (2025-2026)

USS 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.

[- Collapse status history](#)

Topics:

Social Security

Social Services Agencies

FOR INFORMATION ONLY

July 23, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Ted Granger 
Chief Financial Officer

FOR: August 5, 2026 Board of Retirement Meeting
August 12, 2026 Board of Investments Meeting

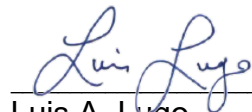
SUBJECT: **Monthly Trustee Travel & Education Report – June 2026**

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 July 1, 2025 through June 30, 2026.

Trustees' attendance of monthly Board and Committee meetings at LACERA's office are considered administrative meetings per the Trustee Travel Policy. In order to streamline report volume and information, these regular meetings, category M, 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

Chief Executive Officer

TG/JT/EW/AC/SE/gj

Attachments

c: J. Popowich
J. Baxter
J. Grabel
S. Rice
R. Contreras

TRUSTEE TRAVEL AND EDUCATION REPORT
FOR FISCAL YEAR 2025 - 2026
JUNE 2026

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
Nancy Durazo			
A 1	Edu - Harvard Business School Executive Education Program: Audit Committees in a New Era of Governance - Boston MA	07/23/2025 - 07/25/2025	Attended
V	- Edu - National University: Ethics (Weekly Courses) - VIRTUAL	08/04/2025 - 10/14/2025	Attended
	- Edu - National University: Public Admin, Urban Planning, Redevelopment (Weekly Courses) - VIRTUAL	09/02/2025 - 10/02/2025	Attended
	- Edu - National University: Compensation and Benefits (Weekly Courses) - VIRTUAL	02/02/2026 - 02/28/2026	Attended
	- Edu - National University - Leadership in the 21st Century (Weekly Courses) - VIRTUAL	04/27/2026 - 05/23/2026	Attended
Trevor Fay			
A 1	Edu - TOIGO - Annual Industry Event - New York City NY	06/11/2026 - 06/11/2026	Attended
B	- Admin - RFP Consultant finalists on site visits - San Francisco CA	06/22/2026 - 06/23/2026	Attended
Bobbie Fesler			
B	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
Mike Gatto			
B	- Edu - iGlobal Forum - 28th Real Estate Private Equity Summit - Los Angeles CA	09/25/2025 - 09/25/2025	Attended
	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
Elizabeth Ginsberg			
A 1	Edu - Harvard Business School Executive Education Program: Audit Committees in a New Era of Governance - Boston MA	07/23/2025 - 07/25/2025	Attended
B	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
V	- Edu - CFA Society LA: Private Equity at an Inflection Point: People, Culture, and the Path Forward - VIRTUAL	05/01/2026 - 05/01/2026	Attended
Jason Green			
A 1	Edu - 2025 SuperReturn Europe - Amsterdam Netherlands	11/04/2025 - 11/07/2025	Attended
B	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
	- Edu - SACRS Spring Conference 2026 - Olympic Valley CA	05/12/2026 - 05/15/2026	Attended
X	- Edu - NCPERS - Legislative Conference & Policy Day - Washington DC	01/26/2026 - 01/28/2026	Host Canceled

TRUSTEE TRAVEL AND EDUCATION REPORT
FOR FISCAL YEAR 2025 - 2026
JUNE 2026

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
Patrick Jones			
A	1 Edu - Goldman Sachs the Garland Summit: Enduring Legacy - New York City NY	10/29/2025 - 10/30/2025	Attended
	2 Edu - Infrastructure Investor Global Summit - America Forum - New York City NY	11/04/2025 - 11/05/2025	Attended
	3 Edu - 2025 Public Funds - Austin TX	11/18/2025 - 11/20/2025	Attended
	4 Edu - 2026 Infrastructure Investor Global Summit - Berlin Germany	03/24/2026 - 03/27/2026	Attended
	5 Edu - Outcome 2030 - Washington DC	05/18/2026 - 05/20/2026	Attended
	6 Edu - 2026 Fiduciary Investors Symposium - Boston MA	06/01/2026 - 06/03/2026	Attended
B	- Edu - 2025 The Investment Diversity Exchange (TIDE) Spark - Dana Point CA	07/09/2025 - 07/10/2025	Attended
	- Edu - Locust Point Capital INC Business Dinner - Los Angeles CA	08/07/2025 - 08/07/2025	Attended
	- Edu - The Toigo Foundation Presents Industry Insights - Los Angeles CA	12/04/2025 - 12/04/2025	Attended
	- Edu - 12th Annual Northern California Institutional Forum - Berkeley CA	12/08/2025 - 12/09/2025	Attended
	- Edu - 2026 Forward Together Conference - Laguna Beach CA	03/18/2026 - 03/20/2026	Attended
	- Edu - With Intelligence the Annual 2026 (formerly Pension Bridge) - Los Angeles CA	04/20/2026 - 04/22/2026	Attended
	- Edu - Infraday California 2026 - Los Angeles CA	04/22/2026 - 04/23/2026	Attended
	- Edu - Power100 Honoree Event - Los Angeles CA	05/02/2026 - 05/03/2026	Attended
	- Edu - SACRS Spring Conference 2026 - Olympic Valley CA	05/12/2026 - 05/15/2026	Attended
	- Edu - 5th Annual Southern California Institutional Forum - Beverly Hills CA	06/11/2026 - 06/11/2026	Attended
	- Admin - RFP Consultant finalists on site visits - San Francisco CA	06/22/2026 - 06/23/2026	Attended
V	- Edu - CAIA Fundamentals of Alternative Investments (Weekly Courses) - VIRTUAL	01/02/2026 - 06/02/2026	Attended
	- Edu - CFA Society LA: Private Equity at an Inflection Point: People, Culture, and the Path Forward - VIRTUAL	05/01/2026 - 05/01/2026	Attended
X	- Edu - Harvard Kennedy School - AI in Action (Weekly Courses) - VIRTUAL	10/10/2025 - 11/10/2025	Canceled
	- Edu - SuperReturn Real Assets North America - Houston TX	04/28/2026 - 04/30/2026	Host Canceled
Shawn Kehoe			
B	- Admin - Retirement Benefits Meeting with Professional Peace Officers Association - San Dimas CA	11/01/2025 - 11/01/2025	Attended
	- Admin - Professional Peace Officers Association (PPOA) Board Offsite - Dana Point CA	01/30/2026 - 01/30/2026	Attended
	- Edu - CFA - Institute Thrive Conference - Los Angeles CA	05/28/2026 - 05/28/2026	Attended
V	- Edu - 2025 CALAPRS Trustee Round Table - VIRTUAL	10/03/2025 - 10/03/2025	Attended
	- Edu - CFA Society LA: Private Equity at an Inflection Point: People, Culture, and the Path Forward - VIRTUAL	05/01/2026 - 05/01/2026	Attended
Aleen Langton			
A	1 Edu - IFEBP - Public Plan Trustees Institute - Level I - Chicago IL	07/15/2025 - 07/16/2025	Attended
	2 Edu - PREA's 2026 Spring Conference - Nashville TN	03/26/2026 - 03/27/2026	Attended

TRUSTEE TRAVEL AND EDUCATION REPORT
FOR FISCAL YEAR 2025 - 2026
JUNE 2026

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
Aleen Langton			
A	3 Edu - 2026 Wharton Investment Strategies and Portfolio Management - Philadelphia PA	04/20/2026 - 04/24/2026	Attended
B	- Edu - 2025 UC Irvine Audit Committee Summit - Irvine CA	09/19/2025 - 09/19/2025	Attended
	- Edu - iGlobal Forum - 28th Real Estate Private Equity Summit - Los Angeles CA	09/25/2025 - 09/25/2025	Attended
	- Edu - NAIC Amplify Alts Forum 2025 - Los Angeles CA	10/01/2025 - 10/01/2025	Attended
	- Edu - CFA Society Los Angeles (Conversations that Connect) - Los Angeles CA	11/06/2025 - 11/06/2025	Attended
	- Edu - 2026 PPI La Jolla Roundtable - San Diego CA	02/25/2026 - 02/27/2026	Attended
	- Edu - 2026 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/18/2026 - 03/19/2026	Attended
	- Admin - Strategic Global Advisors - Pasadena CA	04/09/2026 - 04/09/2026	Attended
	- Edu - CFA - Institute Thrive Conference - Los Angeles CA	05/28/2026 - 05/28/2026	Attended
V	- Edu - Wharton Asset Allocation Program (Weekly Courses) - VIRTUAL	08/01/2025 - 10/01/2025	Attended
	- Edu - 2025 CALAPRS Trustee Round Table - VIRTUAL	10/03/2025 - 10/03/2025	Attended
	- Edu - Wharton Fundamentals of Portfolio Management (Weekly Courses) - VIRTUAL	01/01/2026 - 02/01/2026	Attended
	- Edu - Wharton Investment Products (Weekly Courses) - VIRTUAL	01/02/2026 - 02/02/2026	Attended
	- Edu - NCPERS - Public Retirement Systems Study 2026 - VIRTUAL	02/24/2026 - 02/24/2026	Attended
	- Edu - NCPERS - Policy and Budget Outlook: What's Ahead for Public Pensions in 2026 - VIRTUAL	02/26/2026 - 02/26/2026	Attended
	- Edu - Nasdaq The New Proxy Playbook: Practical Board Oversight After the 2026 Regulatory Shift - VIRTUAL	03/16/2026 - 03/16/2026	Attended
	- Edu - NCPERS Navigating the 2026 Public Pension Compensation Survey - VIRTUAL	04/07/2026 - 04/07/2026	Attended
	- Edu - CFA AI in Action: High-Speed Workflows with Claude Cowork and Excel - VIRTUAL	05/14/2026 - 05/14/2026	Attended
X	- Edu - CALAPRS - Communications Round Table 2026 - VIRTUAL	06/11/2026 - 06/11/2026	Attended
	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Canceled
	- Edu - NCPERS - Legislative Conference & Policy Day - Washington DC	01/26/2026 - 01/28/2026	Host Canceled
Debbie Martin			
A	1 Edu - Invest in Yourself SACRS Public Pension Investment Management Program - Berkeley CA	07/13/2025 - 07/16/2025	Attended
B	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
X	- Edu - 2026 PPI Study Mission to West Asia - Abu Dhabi UAE and Riyadh Saudi Arabia	04/13/2026 - 04/16/2026	Host Canceled

TRUSTEE TRAVEL AND EDUCATION REPORT
FOR FISCAL YEAR 2025 - 2026
JUNE 2026

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
Alma Martinez			
V	- Edu - Wharton Asset and Portfolio Management Certificate Program (Weekly Courses) - VIRTUAL	07/01/2025 - 09/30/2025	Attended
	- Edu - Wharton Executive Education - Investment Products (Weekly Courses) - VIRTUAL	07/01/2025 - 09/30/2025	Attended
	- Edu - Harvard Business School - Alternative Investments (Weekly Courses) - VIRTUAL	08/13/2025 - 09/17/2025	Attended
Nicole Mi			
A	1 Edu - Invest in Yourself SACRS Public Pension Investment Management Program - Berkeley CA	07/13/2025 - 07/16/2025	Attended
	2 Edu - 2nd Annual AAPI LEAD Summit - Atlanta GA	07/23/2025 - 07/25/2025	Attended
	3 Edu - NACD Master Class Technology and Innovation Oversight - Washington DC	04/09/2026 - 04/10/2026	Attended
B	- Edu - 2025 The Investment Diversity Exchange (TIDE) Spark - Dana Point CA	07/09/2025 - 07/10/2025	Attended
	- Edu - 2025 UC Irvine Audit Committee Summit - Irvine CA	09/19/2025 - 09/19/2025	Attended
	- Edu - 2025 NACD PSW Corporate Directors Symposium - Los Angeles CA	11/13/2025 - 11/13/2025	Attended
	- Edu - 2026 Pension Bridge Private Credit - San Diego CA	02/02/2026 - 02/04/2026	Attended
	- Edu - 2026 PPI La Jolla Roundtable - San Diego CA	02/25/2026 - 02/27/2026	Attended
	- Edu - 2026 NASP Southern California "Day of Education in Private Equity Conference" - Los Angeles CA	03/18/2026 - 03/19/2026	Attended
	- Edu - With Intelligence the Annual 2026 (formerly Pension Bridge) - Los Angeles CA	04/20/2026 - 04/22/2026	Attended
	- Edu - 2026 AIF West Coast Investors - Los Angeles CA	04/23/2026 - 04/23/2026	Attended
V	- Edu - Wharton Asset Allocation Program (Weekly Courses) - VIRTUAL	01/02/2026 - 03/02/2026	Attended
	- Edu - CFA Society LA: Private Equity at an Inflection Point: People, Culture, and the Path Forward - VIRTUAL	05/01/2026 - 05/01/2026	Attended
X	- Edu - NCPERS - Legislative Conference & Policy Day - Washington DC	01/26/2026 - 01/28/2026	Host Canceled
	- Edu - 2026 PPI Study Mission to West Asia - Abu Dhabi UAE and Riyadh Saudi Arabia	04/13/2026 - 04/16/2026	Host Canceled
	- Edu - Annual Conference & Exhibition (ACE) 2026 and NCPERS Advanced Fiduciary (NAF) Institute - Las Vegas NV	05/16/2026 - 05/20/2026	Canceled
Wayne Moore			
B	- Edu - Power100 Honoree Event - Los Angeles CA	05/02/2026 - 05/03/2026	Attended
Lisa Proft			
B	- Edu - 2025 SACRS Fall Conference - Huntington Beach CA	11/11/2025 - 11/14/2025	Attended
David Ryu			
B	- Edu - Emerging Managers Summit 2025 - Laguna Niguel CA	12/07/2025 - 12/08/2025	Attended
	- Edu - Pension Power - Sacramento CA	12/12/2025 - 12/12/2025	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

V - Virtual Event

X - Canceled events for which expenses have been incurred.

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

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

FOR INFORMATION ONLY

July 28, 2026

TO: Each Trustee,
Board of Retirement

Each Trustee,
Board of Investments

FROM: Steven P. Rice, *SPR*
Chief Counsel

Francis J. Boyd,
Senior Staff Counsel

FOR: August 5, 2026 Board of Retirement Meeting
August 12, 2026 Board of Investments Meeting

SUBJECT: Status of Fiduciary Counsel Engagements

At the April 1, 2026 Board of Retirement meeting and April 8, 2026 Board of Investments meeting, the Boards approved the recommendation of the Ad Hoc Fiduciary Counsel RFP Committee to engage (1) Klausner Kaufman Jensen & Levinson ("Klausner Kaufman"), (2) Nossaman LLP ("Nossaman"), and (3) Reed Smith LLP ("Reed Smith") as LACERA's fiduciary counsel panel.

Based on the Boards' actions, staff attempted to negotiate engagement agreements with the three firms. Klausner Kaufman and Nossaman promptly executed and returned LACERA's form of agreement without change. However, after negotiations and discussions, staff reached an impasse on material terms with Reed Smith that prevents staff from engaging that firm.

Attached is a privileged memo providing further explanation.

Attachment (Privileged and Confidential – Not for Public Distribution under California Government Code Sections 7927.705, 54957.5(a))

c: Luis A. Lugo
Jonathan Grabel
JJ Popowich
Jessica Baxter
Jude Perez

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