# IN PERSON & VIRTUAL BOARD MEETING

**NOVEMBER 4, 2026 AT 9:00 AM***
**BOARD OF RETIREMENT MEETING**

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

## TO VIEW VIA WEB

**https://lacera.gov/leadership/board-meetings**

## 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, NOVEMBER 4, 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 October 7, 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 October 27, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated October 27, 2026)

B. **Appeal for the Board of Retirement's Meeting of November 4, 2026**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board grant the appeal and request for administrative hearing received from Annie M. Murray. (Memo dated October 20, 2026)

C. **Pensionability Analysis Under CERL and PEPRA for New Pay Item**
Recommendation as submitted by Jean Kim, Senior Staff Counsel that the Board 1) Approve the recommendations set forth above as to the new pay item. 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 October 5, 2026)

VIII. CONSENT ITEMS (Continued)

D. **Legislative Proposal—Prepaid Card Accounts**
Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits, and Legislative Committee: That the Board sponsor legislation for the 2027 legislative year to extend or repeal the sunset date of LACERA's prepaid card program. (Memo dated October 21, 2026) (Supplemental memo dated October 21, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. NON CONSENT ITEMS

A. **Provide Voting Directions on SACRS 2027 Legislative Platform**
Recommendation as submitted by Les Robbins, Chair, Insurance, Benefits, and Legislative Committee: That the Board:

1. Provide voting instructions to its voting delegate to vote YES or NO on sponsorship by the State Association of County Retirement Systems (SACRS) of its legislative proposals for the SACRS 2027 legislative platform; and
2. Provide feedback to staff on these legislative proposals, in particular the substantive proposals.

(Memo dated October 21, 2026)

XI. REPORTS

A. **Report of Revised Pay Item**
Jean Kim, Senior Staff Counsel
(For Information Only) (Memo dated October 13, 2026)

B. **Contract Activity Report – September 2026**
Ricki Contreras, Administrative Services Division Manager
Elsy Gutierrez, Supervising Administrative Assistant II
(For Information Only) (Memo dated October 13, 2026)

C. **1st Quarter Paid Invoice Summary & Threshold Report – July 1, 2026, to September 30, 2026**
Tamara Caldwell, Division Manager, Disability Retirement Services
(For Information Only) (Memo dated October 19, 2026)

XI. REPORTS (Continued)

D. **Monthly Status Report on Legislation**
Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated October 21, 2026)

E. **Monthly Trustee Travel and Education Report – September 2026**
Ted Granger, Chief Financial Officer
(For Information Only) (Memo dated October 22, 2026)

F. **October 2026 Fiduciary Counsel Contact and Billing Report**
Steven P. Rice, Chief Counsel
(For Information Only) (Memo dated (Memo dated October 28, 2026)
(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

B. Disability Retirement Appeals

C. Staff Recommendations

1. **E to D Application of Marcus D. Harvey**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board reject the application of Marcus D. Harvey.
(Memo dated October 19, 2026)

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 Member Roque Roque**
(For Information Only)

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, OCTOBER 7, 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:

JP Harris, Chair (Retired Alternate)

Wayne Moore, Vice Chair

Les Robbins, Secretary

Nancy Durazo (Teleconference Due to Just Cause under Section 54953.8.3.)

Bobbie Fesler

Jason E. Green (Safety Alternate)

Aleen Langton

Ernesto J. Pantoja (Joined the meeting at 11:18 a.m.)

Lisa Proft (Deputy Treasurer and Tax Collector)

David Ryu

ABSENT:

Shawn R. Kehoe

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

Jason Waller, Senior Staff Counsel

Dr. Carly Ntoya, Director, Human Resources

Tamara Caldwell, Disability Retirement Manager

Ted Granger, Chief Financial Officer

Barry W. Lew, Legislative Affairs Officer

Milliman
Craig Glyde, Consulting Actuary
Robert Schmidt, Consulting Actuary
Ryan Cook, Consulting Actuary

Dr. Glenn Ehresmann, Medical Advisor

I. CALL TO ORDER

The meeting was called to order by Mr. Harris at 9:26 a.m. in the Board Room of Gateway Plaza

II. PLEDGE OF ALLEGIANCE

Trustee Fesler 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

Trustee Durazo requested to participate in the meeting via teleconference for Just Cause, pursuant to Government Code Section 54953.8.3(c)(3)(SB 707). The reason for Just Cause was a need related to a medical condition. A physical quorum was present at the noticed meeting location. Trustee Durazo confirmed that no individuals 18 years of age or older were present at the teleconference location.

IV. APPROVAL OF THE MINUTES

A. Approval of the Minutes of the Regular Meeting of September 2, 2026

Trustee Langton made a motion, Trustee Fesler seconded, to approve the minutes of the Regular Meeting of September 2, 2026. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Proft

Absent: Pantoja

Abstain: Moore and Robbins

V. PUBLIC COMMENT

Member, Joseph Segreto addressed the board regarding his Administrative Appeal.

VI. EXECUTIVE UPDATE

A. LACERA All Stars

Mr. Popowich announced the winners for the month: Claudine Jakosalem, Irma Ornelas, Katy Tieu and Sarah Espinoza. The web watcher winner was Margaret Chwa and there were no Rideshare winners.

VI. EXECUTIVE UPDATE

B. Member Spotlight

Mr. Popowich recognized LACERA member, Cookie Jaranilla.

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 Enforcement
Service-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.

| APPLICATION NO. | NAME |
|---|---|
| 36F | MEDINA, CHRISTOPHER B. |
| 37F | GUDINO, NATHAN |
| 38F | GERMAN, DAVID L. |
| 39F | AVILA, STANLEY P. |
| 40F | CROSBY, STEVEN |
| 41F* | ALVA, LARRY A. |
| 42F | LEDESMA, RUBEN C. |
| 43F | FACCHINI, ALFRED D., III |
| 44F | MAUTIER, ROGER |
| 45F | NAVARRO, PAMELA S. |
| 46F | MANN, BRIAN J. |
| 47F** | SCHREINER, JASON M. |
| 48F | MUNOZ, RICHARD, JR. |
| 49F*** | WRIGHT, TUI O. |
| 50F | RICCI, CRISTINA M. |

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

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued)
Service-Connected Disability Applications

| APPLICATION NO. | NAME |
|---|---|
| 51F | ESTRELLA, DANIEL S. |
| 52F | ESQUEDA, ALFONSO |
| 53F | VALENCIA, ARTURO |
| 54F | MEZA, JOSE J. |
| 55F | MEYER, ANDREW D. |
| 56F | FIGUEROA, ROBERTO A. |
| 57F | DAMIAN, DANIELLE M. |
| 58F | SILGERO, VALERIE E. |
| 59F | SPARKS, STEPHANIE V. |
| 60F | POINDEXTER, ROBERT J. |
| 61F | ESPINOSA, BRIAN A. |
| 62F | LEE, DONALD T. |
| 63F | HEALD, JOHN L. |
| 64F | MATLOCK, SCOTT A. |
| 65F* | MCKAIG, RICHARD W. |
| 66F | SATHER, STEVEN B. |
| 67F | SILVA, ROBERT J. |
| 68F | OLIVER, MARIANNE J. |
| 69F | FARMAR, JEFFREY A. |
| 70F | HILL, KENNETH P.,JR. |
| 71F | CONN, JEREMY W. |
| 72F | CABRAL, JOSEPH M., III |
| 73F | AKCHYAN, GABRIEL |
| 74F* | AMADOR, ROBIN D. |
| 75F | PAUL, SAMUEL S. |
| 76F | KLEEH, JOHN C., II |
| 77F | WILLIAMS, HOLLY L. |

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

*Granted SCD – Retroactive

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Fire, Lifeguards
Service-Connected Disability Applications

On a motion by Trustee Green seconded by Trustee Proft, 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.

| APPLICATION NO. | NAME |
|---|---|
| 1153C | LECLERCQ, JAIME M. |
| 1154C | REARDON, ROBERT T. |
| 1155C | LAVOIE, NORMAN J. |
| 1156C | QUIROZ, ROBERT P. |
| 1157C* | GALIHER, JON D. |
| 1158C* | BRITTON, JEFFREY J. |
| 1159C* | BARNES, JAMES L. |
| 1160C | WILSON, EDMOND M. |
| 1161C* | FOSTER, WYNTON A. |
| 1162C | HERNANDEZ, RONALD G. |
| 1163C | SOURBEER, CHAD B. |
| 1164C | MARTINEZ, GUSTAVO |
| 1165C | RICHEY, MICHAEL J. |
| 1166C | CULL, KEVIN J. |
| 1167C | CHEN, JOSEPH J. |
| 1168C | CLEMENTS, BRIAN J. |
| 1169C | WRIGHT, DAVID M. |
| 1170C* | KUMASHIRO, STEVEN M. |
| 1171C | KRAUSHAAR, NICHOLAS N. |
| 1172C* | BARTH, CHRISTOPHER E. |
| 1173C | RUSSELL, NATHAN C. |

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

*Granted SCD – Retroactive

## VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members
Service-Connected Disability Applications

On a motion by Trustee Robbins seconded by Trustee Proft, 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.

| APPLICATION NO. | NAME |
|---|---|
| 2270D* | NCHA, AWU |
| 2271D** | LOPEZ, LOUIE R. |
| 2272D* | ARAMBULA, CARINA A. |
| 2273D*** | SIMPSON, NOVITA D. |
| 2274D* | YU, CONNIE M. |
| 2275D*** | ALVAREZ, JOVANI F. |
| 2276D**** | CAESAR, KIMBERLY D. |
| 2277D* | LOWENBERG, GRACE M. |
| 2278D*** | CORTEZ, LORENA |
| 2279D* | BERGMAN, ANDREW P. |
| 2280D | MCGEE, JOHNNIE |
| 2281D | FAER, SCOTT |
| 2282D | BRUCE, LYDIA I. |
| 2283D | MCGEE, NOPAWAN |
| 2284D | ORTEGA, VICTOR |
| 2285D** | KAMALI, ANI |
| 2286D*** | MCCRARY, HOWARD E. |
| 2287D | CHASE, CLAUDIA |
| 2288D | PRYOR, CHRISTOPHER L. |
| 2289D | REESE, EZRA D. |
| 2290D | HAYHURST, AMANDA E. |

*Granted SCD – Employer Cannot Accommodate
**Granted SCD – Retro
***Granted SCD – Salary Supplemental
****Granted SCD – Salary Supplemental Employer Cannot Accommodate

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members (Continued)
Service-Connected Disability Applications

| APPLICATION NO. | NAME |
|---|---|
| 2291D* | IRIBE, ENRIQUE E. |
| 2292D | NAVARRO, YVETTE |
| 2293D | VAUGHAN, PAIGE B. |
| 2294D | SYMONDS, ESTHER M. |
| 2295D* | ZAMORANO, DAVID H. |

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

General Members
Nonservice-Connected Disability Applications
On a motion by Trustee Robbins, seconded by Trustee Proft, the Board of Retirement made a motion to approve a nonservice-connected disability retirement for the following named employee who met the burden of establishing permanent incapacity from the performance of her usual duties.

| APPLICATION NO. | NAME |
|---|---|
| 4526 | BOSS, STEPHANIE C. |

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

*Granted SCD – Salary Supplemental

VIII. CONSENT ITEMS

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

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

A. **Ratification of Service Retirement and Survivor Benefit Application Approvals**
Recommendation that the Board approve the service retirements and survivor benefit applications received as September 29, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated September 29, 2026)

B. **Ratification of Outgoing Reciprocal Disability Retirement**
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 September 16, 2026)

C. **Recommendation to Approve Sam Bakshian, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Sam Bakshian, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

D. **Recommendation to Approve Keith Liberman, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Keith Liberman, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

VIII. CONSENT ITEMS (Continued)

E. **Recommendation to Approve Alejandro Farias, M.D. (Neurologist) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Alejandro Farias, M.D. - Neurologist, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

F. **Recommendation to Approve Mark A. Mandel, M.D. (Hand Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Mark A. Mandel, M.D. - Hand Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

G. **Recommendation to Approve Robert M. Wilson, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Robert M. Wilson, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

H. **Recommendation to Approve Nasser Heyrani, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Nasser Heyrani, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

I. **Dismiss with Prejudice the Appeal of Hilda Aranda**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Hilda Aranda's appeal for a service-connected disability retirement. (Memo dated September 15, 2026)

VIII. CONSENT ITEMS (Continued)

J. **Appeals for the Board of Retirement's Meeting of October 7, 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 James M. Golondzinier and direct the Disability Retirement Services Manager to refer the case to a referee. (Memo dated September 17, 2026)

K. **Chief, Communications Classification and Compensation Changes**
Recommendation as submitted by Nicole Mi, Chair, Joint Organizational Governance Committee: That the Board approve the proposed changes to the Chief, Communications, LACERA classification and compensation be approved for implementation, including submission to the Board of Supervisors:

1. Classification title change from Chief, Communications, LACERA to Director, Communications, LACERA.
2. Classification specification revisions.
3. Salary reallocation from MAPP Tier II salary schedule LS 10 to LS 12.

(Memo dated October 7, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. NON CONSENT ITEMS

A. **2027 STAR COLA Program Award**
Recommendation as submitted by Ted Granger, Chief Financial Officer: (1) That the Board of Retirement decide whether to award a STAR COLA for Program Year 2027, and

(2) If a benefit is approved, determine whether the STAR COLA benefits will be on an ad-hoc basis at a cost of $763,000 for a one-year addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027, or

X. NON CONSENT ITEMS (Continued)

(3) If a benefit is approved, determine whether the STAR COLA benefits will be on a permanent basis at a cost of $7,941,000 for a lifetime addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027.
Ted Granger, Chief Financial Officer
Craig Glyde, Consulting Actuary, Milliman
(Presentation) (Memo dated September 23, 2026)

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

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

XI. REPORTS

A. **2026 Other Post-Employment Benefits (OPEB) Program Educational Session and Program Updates**
Ted Granger, Chief Financial Officer
Robert Schmidt, Consulting Actuary, Milliman
Ryan Cook, Consulting Actuary, Milliman
(Presentation) (Memo dated September 23, 2026)

Mr. Granger and Messrs. Schmidt and Cook of Milliman provided a presentation and answered questions from the Board. This item was received and filed.

B. **Assembly Bill 1383: Veto Message**
Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated September 21, 2026)

This item was received and filed.

XI. REPORTS (Continued)

C. **Contract Activity Report – August 2026**
Ricki Contreras, Administrative Services Division Manager
Elsy Gutierrez, Supervising Administrative Assistant II
(For Information Only) (Memo dated September 11, 2026)

This item was received and filed.

D. **Monthly Status Report on Legislation**
Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated September 23, 2026)

Mr. Lew provided an update to the Board. This item was received and filed.

E. **Monthly Trustee Travel & Education Report – August 2026**
Ted Granger, Chief Financial Officer
(For Information Only) (Memo dated September 23, 2026)

This item was received and filed.

F. **September 2026 Fiduciary Counsel Contact and Billing Report**
Steven P. Rice, Chief Counsel
(For Information Only) (Memo dated (Memo dated September 21, 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
(Trustee Pantoja joined the meeting at 11:18 a.m.)

A. Applications for Disability

APPLICATION NO. & NAME AND BOARD ACTION

5500B – MURRAY, ANNIE M.

Trustee Proft made a motion, Trustee Fesler seconded to deny a service-connected disability retirement, as the applicant is not permanently incapacitated. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

APPLICATION NO. & NAME AND BOARD ACTION

5501B – DOLSON, CYNTHIA A.

Trustee Fesler made a motion, Trustee Proft seconded to deny a service-connected disability retirement, pursuant to Government Code section 31722. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Proft, Robbins, Ryu

Absent: Pantoja

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

APPLICATION NO. & NAME AND BOARD ACTION

5502B – GARZA, ANDREW M.

Trustee Langton made a motion, Trustee Pantoja seconded to deny a service-connected disability retirement retroactive and grant a nonservice-connected disability retirement pursuant to Government Code section 31720. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Pantoja, Proft, Robbins, Ryu

APPLICATION NO. & NAME AND BOARD ACTION

5471B – VILLASENOR, FELICISIMA

This item was pulled for further development.

B. Disability Retirement Appeals

APPLICATION NO. & NAME AND BOARD ACTION

CHAVEZ, COLETTE N. * – Kelli Krupka/Thomas Wicke for the Applicant
Jason Waller for the Respondent

Trustee Langton made a motion, Trustee Ryu seconded to review a copy of the transcript. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Green, Langton, Moore, Pantoja, Proft, Robbins, Ryu

C. Staff Recommendations

1. **E To D Application of Charese L. Kendricks**
Recommendation as submitted by Tamara Caldwell, Division Manager: That the Board reject the application of Charese L. Kendricks for processing. (Memo dated September 21, 2026)

*Applicant and/or Applicant's Attorney Present

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

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

Yes: Durazo, Fesler, Green, Langton, Moore, Pantoja, Proft, Robbins, Ryu

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 David Wong**

On a motion by Trustee Proft, seconded by Trustee Pantoja, the Board voted to deny the administrative appeal of David Wong, with Trustees Durazo, Fesler, Green, Langton, Moore, Pantoja, Proft, Robbins and Ryu, voting yes.

2. **Administrative Appeal of Joseph Segreto**

On a motion by Trustee Green, seconded by Trustee Moore, the Board voted to deny the administrative appeal of Joseph Segreto, with Trustees Durazo, Fesler, Green, Langton, Moore, Pantoja, Proft, Robbins and Ryu, voting yes.

B. Public Employee Performance Evaluation
(Pursuant to Paragraph (1) of Subdivision (b) of California Government Code Section 54957)

1. **Title: Chief Counsel**

There is nothing to report.

XVII. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 1:04 p.m.

_____
LES ROBBINS, SECRETARY

_____
JP HARRIS, CHAIR

# Recognizing Our Members' Service and Accomplishments

LACERA has over 120,000 active members working in dozens of L.A. County departments, many of whom dedicate their entire working lives to serving the community. Meet one of our long-serving members who is on the road to retirement.

MEMBER SPOTLIGHT

## Retiring Member

# Julio Jr. Alayon

**Pharmacy Technician, Malk-Out Patient Pharmacy MALC**
**Years of Service: 21**

**Notable Contributions:** Julio Jr. Alayon is set to retire in December after 21 years of dedicated service to L.A. County. In his role, Julio helps process prescriptions, verifies patient information, and ensures medications are dispensed accurately.

**Giving Back:** Julio and his wife are very involved in their community and enjoy participating in various fundraisers.

**Life Hero:** His wife, who inspired him to pursue a career as a pharmacy technician and has supported him thought his career.

**Retirement Plans:** Julio plans to ravel and spend more time with his family. He also hopes to devote more time to cycling, swimming, hiking, photography and connecting with his neighbors.

LACERA
Los Angeles County Employees Retirement Association

# Chief Executive Officer's Report

**November 2026**

*Prepared for the Board of Retirement and Board of Investments*

01

SECTION ONE

# Organizational Updates

*Board initiatives, hiring, and key events*

# Executive Update

*Board governance, stakeholder participation and awards*

BOARD GOVERNANCE

## General Elections

*Three-year terms: January 1, 2027–December 31, 2029*

The Los Angeles County Board of Supervisors declared these results official.

**Board of Investments**

Nicole Mi: Second Member

James Brekk: Eighth Member

**Board of Retirement**

Nicole Mi: Second Member

Leslie William Robbins: Eighth Member

James P. (JP) Harris: Alternate Retired Member

STAKEHOLDER ENGAGEMENT

## Outreach & County Leadership

Luis Lugo and Steven Rice participated as panelists at Nossaman's 2026 Fiduciaries' Forum.

Maria Elena Durazo to succeed Hilda Solis on the Board of Supervisors.

AWARDS & RECOGNITION

## GFOA & PPCC

*Financial Reporting & Standards*

GFOA Certificate of Achievement for Excellence in Financial Reporting for its Annual Comprehensive Financial Report (ACFR), including the division's Financial Reporting Achievement award for FYE 2025.

PPCC: Public Pension Standards Award for FYE 2025.

**COMMUNITY PARTICIPATION**

LACERA + RELAC Food Bank | Saturday, November 7, 2026, 9 a.m.–1 p.m.
Los Angeles Regional Food Bank | City of Industry, CA

# Hiring Update

*Reporting Period: September 16, 2026 – October 15, 2026*

## RECRUITMENTS UNDERWAY

*Active searches across divisions*

- **Administrative Services** — Administrative Services Officer (Budget & Vendor Management)
- **Human Resources** — Senior Human Resources Analyst - Disability Management Compliance and Talent Acquisition (Interdepartmental Transfer)
- **Investments** — Principal Investment Officer (Promotional)

## INTERNAL PROMOTIONS

RBS | Retirement Benefits Specialist

**BENEFITS**

**Jannel Sarian** RBS III
**Keenan Holder** RBS III
**Joie Dang** RBS III
**Crystal Castaneda** RBS III
**Rebecca Yu** Senior RBS

**MEMBER SERVICES**

**Alan Wu** RBS III
**Nouchik Gilabouchian** RBS III
**Moises Marroquin** RBS III
**Kristopher Lundberg** RBS III
**Martiza Perez** Senior RBS

## ADDITIONS TO THE TEAM

*Welcome to LACERA*

**Ramiro Ixtlahuac** — **Administrative Services**
Document Processing Specialist

**Harper Wells** — **Ethics & Compliance Office**
Chief Ethics and Compliance Officer

**John Almquist** — **Legal**
Senior Staff Counsel

02

SECTION TWO

# CEO Dashboard

*Service metrics and operational performance*

# Total Fund Performance

**Fiscal Year End: June 30, 2026*

| | |
|---|---|
| FUNDED RATIO | 84.8% |
| ASSUMED RATE OF RETURN | 7.0% |

**$94.5B**
PENSION BALANCE
Total Net Assets

**$103.6B**
PENSION ACTUARIAL ACCRUED LIABILITY (AAL)

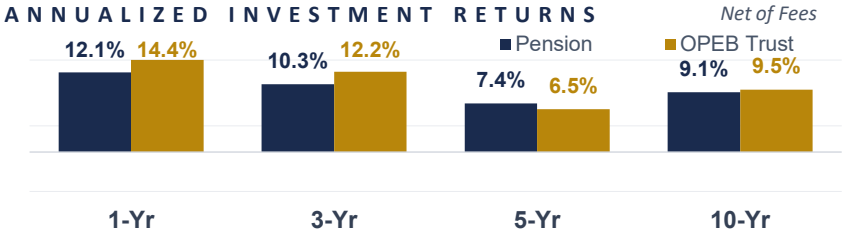
**$15.8B**
PENSION UNFUNDED AAL (UAAL)

**$6.7B**
OPEB TRUST BALANCE
Total Net Assets

**$26.9B**
OPEB ACTUARIAL ACCRUED LIABILITY (AAL)
As of July 1, 2025

**$21.9B**
OPEB UNFUNDED AAL (UAAL)
As of July 1, 2025

## ANNUALIZED INVESTMENT RETURNS




## LACERA PENSION DOLLAR

*WHERE EACH PENSION DOLLAR COMES FROM*

**OPEB AAL and UAAL will be available in January 2027. All other FYE 2026 figures are preliminary.*

# Disability Applications Snapshot

*November Disability Agenda*

*Reporting as of October 22, 2026*

**KEY METRICS** *Target: 12 months*

**16** AVERAGE PROCESSING (MONTHS)

**11%** Processed in 12 months or less

**73** APPLICATIONS PRESENTED TO BOARD

**375** APPLICATIONS PRESENTED TO BOARD FYTD

**2** APPEALS PRESENTED TO BOARD

**6** APPEALS PRESENTED TO BOARD FYTD

## *Disability Application Status*

### APPLICATIONS

**1,050**
Pending in Process

**56**
New Applications*

**314**
Received FYTD

### APPEALS

**56**
Pending in Process

**1**
New Appeals

**7**
Received FYTD

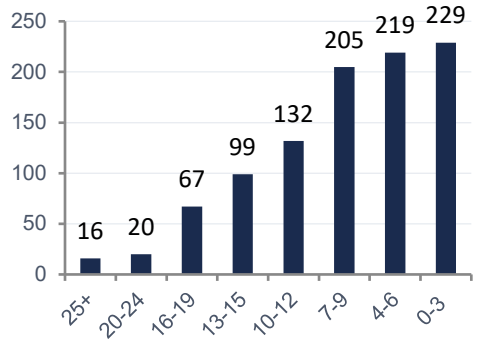
### PENDING APPLICATION BY DEPARTMENT | TOP 3

Sheriff | 454 (43%)  Probation | 220 (21%)
Fire | 144 (14%)

### PENDING APPLICATIONS BY MILESTONE

| | |
|---|---|
| Intake Review | **80** (8%) |
| Records Request | **203** (19%) |
| File Indexing | **196** (18%) |
| Pending Interview | **190** (18%) |
| Drafting Report | **139** (14%) |
| Medical Review | **175** (17%) |
| Post Medical Review | **16** (2%) |
| Board Prep | **23** (2%) |
| Final Case Review | **28** (3%) |

### PENDING APPLICATIONS BY MONTH RANGE

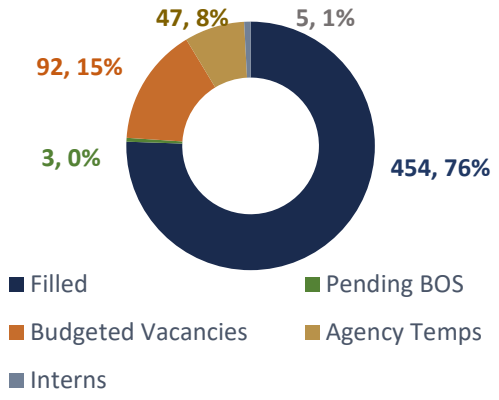



*New Applications reflect October 1-22, 2026 (month in progress). FYTD = current fiscal year (July 1-present)*

# HR Workforce Snapshot

*Reporting Period: September 16, 2026 – October 15, 2026*

## POSITIONS BREAKDOWN

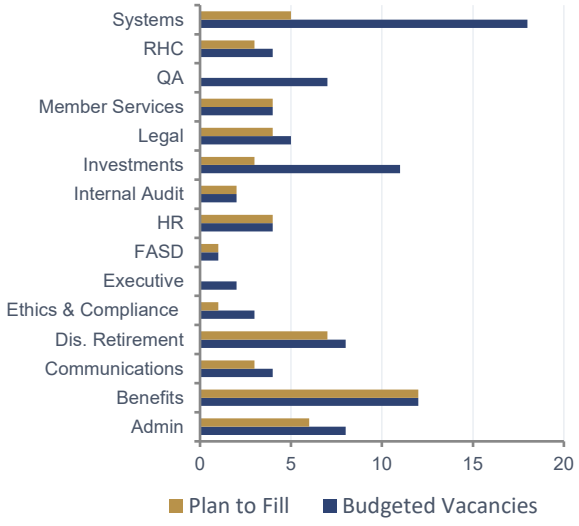



## VACANCY RATE

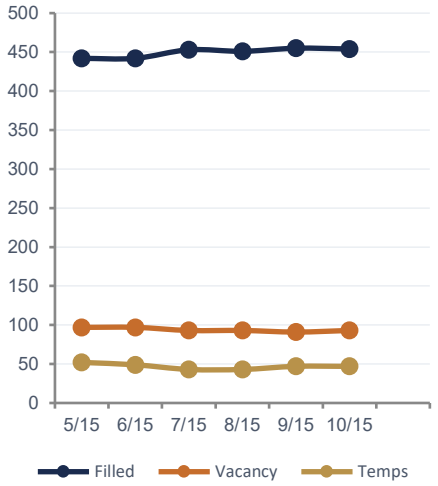
**11%**
PLAN TO FILL

**17%**
ALL BUDGETED

## VACANCIES BY DIVISION




## MONTH-TO-MONTH



# Membership Snapshot

*Reporting Period: As of October 20, 2026*

**200,918**
TOTAL MEMBERSHIP COUNT

**$433.6M**
MONTHLY PAYROLL
*$1.3 FYTD | 99% Direct Deposit*

**272**
NEW RETIRED PAYEES
*September 2026*

## MEMBERSHIP BY STATUS

| | General | Safety | Total |
|---|---|---|---|
| ACTIVE | 86,914 | 12,145 | 99,059 |
| RETIRED | 64,112 | 15,372 | 79,484 |
| INACTIVE (Vested & Non-Vested) | 20,778 | 1,597 | 22,375 |

## MEMBER MONTHLY BENEFIT

| | GROSS AVERAGE BENEFIT | GROSS MEDIAN BENEFIT |
|---|---|---|
| General Plans | $4,624 | $3,677 |
| Safety Plans | $10,204 | $10,225 |
| All Plans | $5,689 | $4,407 |

Survivor Average Monthly Benefit **$3,972**

Average = total benefits ÷ recipients. Median = midpoint of benefits, less affected by unusually high or low amounts.

# Member Services Snapshot

*Reporting Period: September 30, 2026*

## MS CALL CENTER

*Main Queue, MyLACERA Support, HR Pro Support*

**8,145**

Total Calls

*Top Topics: Retirement Counseling, MyLACERA*

**90% Answered**

10% Abandoned

| | |
|---|---|
| Avg Speed of Answer | **~5 min** |
| Avg Duration | **~14 min** |

***Callback Queue***

210 | 97% Answered

## RHC CALL CENTER

*Retiree Healthcare*

**3,879**

Total Calls

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

**93% Answered**

7% Abandoned

| | |
|---|---|
| Avg Speed of Answer | **~4 min** |
| Avg Duration | **~14 min** |

***Callback Queue***

78 | 100% Answered

## MSC APPOINTMENTS

| Month | FYTD |
|---|---|
| **855** | **2,844** |

In-Person 434 | Virtual 415 | Phone 6

**97%** *MSC Satisfaction*

## EVENTS & WEBINARS

| | Month | YTD |
|---|---|---|
| *Events/Webinar* | **29** | **76** |
| *Attendance* | **2,271** | **3,195** |

| *MS Member Emails* | *RHC Member Emails* |
|---|---|
| 1,168 | 753 |

MS and RHC Member Emails include My LACERA Portal emails.

# Online Services | Social Media & MyLACERA

*Reporting Period: September 30, 2026*

**131,328**
TOTAL MEMBER ACCOUNTS

**66%**
PERCENTAGE OF TOTAL MEMBERS

**1,334**
NEW ACCOUNTS IN SEPTEMBER

FOLLOWER COUNTS

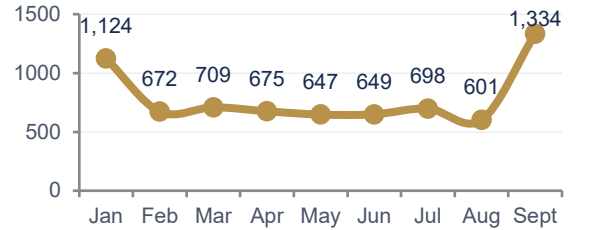
**973** (+262% YTD)

**1,346** (+1,671% YTD)

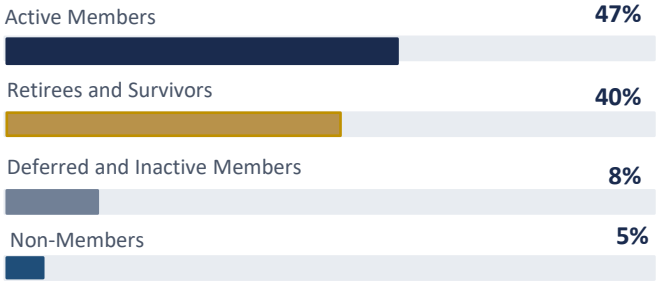
**4,570** (+17% YTD)

Data as of September 2026

## ANNUAL NEW MYLACERA ACCOUNTS




## ACCOUNTS BY MEMBER TYPE



# Retiree Healthcare Premium and Enrollments

*Reporting Period: September 30, 2026*

**RETIREE HEALTHCARE PROGRAM ENROLLMENTS**

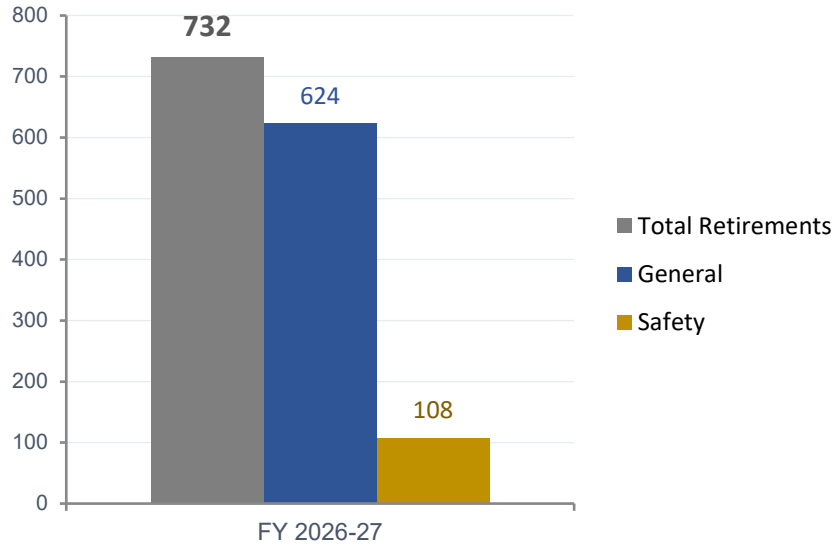
*Dollars in millions | County Contribution, Member Contribution, and Enrollment count by benefit*

| BENEFIT | COUNTY CONTRIBUTION | MEMBER CONTRIBUTION | ENROLLMENTS |
|---|---|---|---|
| Medical | $70.5 | $4.9 | 59,186 |
| Dental | $4.8 | $0.4 | 61,735 |
| Part B | $10.3 | | 41,374 |
| Long Term Care | — | $0.018 | 56 |
| TOTAL | $85.6 | $5.3 | 162,153 |

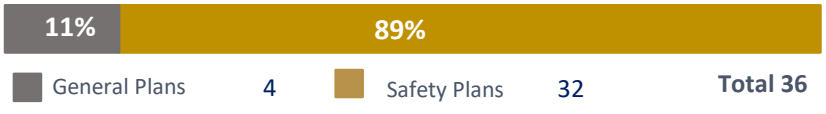
# Retirements | Member Snapshot

*FY 26-27 | Reporting as of October 20, 2026*

## FY 26-27 TOTAL RETIREMENTS




## FIRE RETIREMENTS | FYTD




## SHERIFF RETIREMENTS | FYTD

## GENERAL & SAFETY | FYTD

## TOTAL RETIREMENTS | FYTD

**732**

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 October 14, 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 | Contract Execution | The IIA |
| **Knowledge Management Solution** | Legal | 10/31/2025 | Contract Development | Oxcyon Inc. |
| **Systems and InfoSec Classification and Compensation Study** | Human Resources | 1/26/2026 | Contract Development | CBIZ Business & Insurance Services |
| **Virtual Mailroom** | Administrative Services | 10/23/2026 | Soliciting Process | - |

# Quiet List | Investments

| 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<br>RCLCO Fund Advisors, LLC, StepStone Group LP, Meketa Investment Group, Inc |

# Upcoming Conferences

*Trustee development & industry conferences | November 2026 – March 2027*

| | | |
|---|---|---|
| Nov 3-5 | ILPA Summit | *New York, NY* |
| Nov 3-5 | P&I World Pension Summit | *The Hague, NL* |
| Nov 10-13 | SACRS Fall Conference | *Rancho Mirage, CA* |
| Nov 17 | Public Service AI Summit 2026 | *Washington, DC / virtual* |
| Nov 17-19 | Fiduciary Investors Symposium 2026 | *University of Oxford, UK* |
| Nov 18-20 | Singapore FinTech Festival | *Singapore* |
| Nov 24-25 | Future of Asset Management Europe | *London, UK* |
| Dec 2 | IPE Conference & Awards 2026 | *London, UK* |
| Dec 7-11 | GITEX Global Summit and Expo | *Dubai, UAE* |
| Dec 9-10 | The AI Summit New York | *New York, NY* |
| Dec 9-11 | The GovAI Coalition Summit | *San Jose, CA* |
| Dec 10 | CALAPRS Round Table – Benefits | *Virtual* |
| Feb 2-3, 2027 | IFEBP Health Benefits Conference & Expo | *Ponte Vedra Beach, FL* |
| Mar 1-3 | NCPERS Communications & Member Services Summit | *New Orleans, LA* |
| Mar 3-5 | Pacific Pension Institute (PPI) San Francisco Roundtable | *San Francisco, CA* |
| Mar 7-10 | HumanX | *Las Vegas, NV* |
| Mar 8-10 | CALAPRS General Assembly 2027 | *Coronado, CA* |
| Mar 8-10 | Council of Institutional Investors (CII) Spring Conference | *Washington, DC* |
| Mar 8-10 | AHIP Medicare, Medicaid, Dual Eligibles and Commercial Markets Forum | *Washington, DC* |
| Mar 15-18 | NVIDIA GTC 2027 | *San Jose, CA* |
| Mar 18-19 | PREA Spring Conference | *San Diego, CA* |
| Mar 18-19 | NACD Master Class – Technology & Innovation Oversight | *Washington, DC* |

# Report of Felony Forfeiture Cases

*As of October 23, 2026*

## CURRENT REPORTING STATUS

**There is one new felony forfeiture case added to the report for this period.*

## 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 |
|---|---|---|
| Mark Ridley-Thomas (Under Appeal) | BOS | 3/31/2023 |
| Dannie T. Kamack (Under Appeal) | Probation | 3/3/2025 |
| Christopher Cadman | Sheriff | 7/14/2025 |
| David A. Rodriguez | Sheriff | 7/14/2025 |
| Michael D. Coberg (Delayed) | Sheriff | 9/29/2025 |
| Archam Karibian | DPSS | 11/19/2025 |
| Joshua Saravia | Probation | 1/21/2026 |
| Toni Pittmon (Delayed) | DCFS | 2/17/2026 |
| Tommy Trimble | Sheriff | 2/17/2026 |
| Scott Schenter | Assessor | 3/4/2026 |
| Scott Simpkins | Sheriff | 3/17/2026 |
| Adrian Munoz | Medical Examiner | 4/10/2026 |
| Kameko Tisdale | DCFS | 4/27/2026 |
| Shalita Hammell | DCFS | 05/19/2026 |
| *Georgette McKinney | Child Support Services | 08/18/2026 |

# Public Records Requests

*Information and Documents Requested under California Public Records Act*
*Reporting Period: October 15, 2026 – November 14, 2026*

| DATE | REQUESTOR | REQUEST SUMMARY |
|---|---|---|
| 09-17-26 | F. Galindo, Individual | Employment-related records created, received, sent or maintained from Oct. 1, 2025, through Sept. 30, 2026, including later records concerning, documenting or investigating F. Galindo's employment with LACERA. |
| 09-18-26 | D. Fraser, Individual #1 | LACERA rule capping accumulated CPI at 20% for retiree COLA increases and allowing an additional increase above CPI. |
| 09-18-26 | D. Fraser, Individual #2 | LACERA policy or resolution capping accumulated CPI at 20% for retiree COLA increases and allowing an additional increase above annual CPI. |
| 09-18-26 | D. Fraser, Individual #3 | LACERA policy or resolution capping accumulated CPI at 20% for retiree COLA increases and allowing an additional increase above annual CPI. |
| 09-18-26 | D. Fraser, Individual #4 | California rule, policy, resolution or law capping accumulated CPI at 20% and allowing additional retiree COLA increases to reduce accumulated CPI to 20%. |
| 09-18-26 | D. Fraser, Individual #5 | Federal rule, policy, resolution or law capping accumulated CPI at 20% and allowing additional retiree COLA increases to reduce accumulated CPI to 20%. |
| 09-18-26 | K. Killian, Truth About Persons | Latest existing electronic payee or pension-payroll record for living members receiving their own service-retirement benefit. Existing export preferred, with no new ranking, calculation or record. |
| 09-24-26 | A. Oxford, Bloomberg | Confirmation or updated information on LACERA's reported $82,568 Guggenheim investment, reflecting any market-value change since 2013. |
| 09-25-26 | A. Lindstrom, Sierra Club | LACERA's 2026 proxy voting records. |

# Public Records Requests

*Information and Documents Requested under California Public Records Act*
*Reporting Period: September 15, 2026 – October 14, 2026*

| DATE | REQUESTOR | REQUEST SUMMARY |
|---|---|---|
| 09-27-26 | M. Raciel, with.Intelligence | Q1 2026 private markets performance data, as of March 31, 2026, because Q2 2026 data is not yet available. |
| 09-29-26 | C. Donovan, Individual | Latest existing annual report of payee names and benefit amounts, including 2025 or 2026 versions. Existing report or export of all retirees, survivors, beneficiaries and continuance payees paid since Jan. 1, 2020, plus field list. |
| 09-30-26 | S. Beiderwell, County of Monterey | LACERA membership eligibility rules for 2012–2014 and eligibility determinations for the Los Angeles Superior Court Law Clerk – Bar Member classification from 2012 to present. |
| 10-05-26 | T. Hettinger, LP Analyst, LP | Latest private asset portfolio returns from inception or since LACERA last provided information to LP Analyst. |
| 10-05-26 | C. Teissier, Axorion | Duplicates of 16 redacted secondary-sale documents emailed June 11, 2025, for the June 2, 2025, FOIA Data Aggregation Team request, plus the final cover email or letter and attachment/file list, if held. |
| 10-07-26 | L. Chatar, SmartProcure | All purchasing records from March 31, 2026, to current. |

# Thank *You.*

Chief Executive Officer's Report | November 2026

*Los Angeles County Employees Retirement Association*

*Questions and discussion*

LACERA

**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**

October 27, 2026

**TO:** Trustees, Board of Retirement

**FOR:** Board of Retirement Meeting on November 4, 2026

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

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

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| JEFFREY T. CHRISTENSEN | L A COUNTY FIRE DEPT Dept.# FR | 09-25-2026 | 25 YR, 0 MO |
| JOHN LUNA | L A COUNTY FIRE DEPT Dept.# FR | 11-19-2026 | 36 YR, 2 MO |
| ANDREW G. O'HENLEY | L A COUNTY FIRE DEPT Dept.# FR | 11-30-2026 | 29 YR, 0 MO |
| JOSE RODRIGUEZ JR | L A COUNTY FIRE DEPT Dept.# FR | 09-30-2026 | 32 YR, 4 MO |
| JERAMY W. VIRGIN | L A COUNTY FIRE DEPT Dept.# FR | 10-31-2026 | 25 YR, 2 MO |
| DUANE J. BOOKMAN | SHERIFF Dept.# SH | 10-31-2026 | 43 YR, 8 MO |
| MICHAEL C. BROCK | SHERIFF Dept.# SH | 10-31-2026 | 27 YR, 9 1/2 MO |
| LUIS CASTRO | SHERIFF Dept.# SH | 11-28-2026 | 37 YR, 1 MO |
| BRIAN D. NOWELL | SHERIFF Dept.# SH | 10-31-2026 | 31 YR, 0 MO |
| BRENDA PARKER | SHERIFF Dept.# SH | 11-28-2026 | 35 YR, 6 MO |
| ERIC M. RODRIGUEZ | SHERIFF Dept.# SH | 10-31-2026 | 27 YR, 0 MO |
| JEAN-MARC V. SANCHEZ | SHERIFF Dept.# SH | 10-09-2026 | 25 YR, 3 1/2 MO |
| ROY A. SMITH | SHERIFF Dept.# SH | 10-31-2026 | 29 YR, 8 MO |
| PABLO S. SUAREZ | SHERIFF Dept.# SH | 11-30-2026 | 20 YR, 0 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| SIDNEY H. CHOW | AGING DEPARTMENT<br>Dept.# AG | 11-01-2026 | 26 YR, 1 MO |
| DEBORAH A. JONES | AGING DEPARTMENT<br>Dept.# AG | 11-28-2026 | 25 YR, 1 1/2 MO |
| DAGNACHEW TESHOME | AGRICULTURAL COMM./WTS & MEAS.<br>Dept.# AW | 10-05-2026 | 24 YR, 4 MO |
| DAVID A. ROSS | ALTERNATE PUBLIC DEFENDER<br>Dept.# AD | 11-28-2026 | 29 YR, 3 MO |
| FLORENCE AHENKORAH | AMBULATORY CARE NETWORK<br>Dept.# HN | 12-01-2026 | 31 YR, 8 MO |
| JOSE G. GOMEZ | AMBULATORY CARE NETWORK<br>Dept.# HN | 11-28-2026 | 26 YR, 6 1/2 MO |
| CHANDRA L. JOHNSON | AMBULATORY CARE NETWORK<br>Dept.# HN | 10-31-2026 | 34 YR, 11 MO |
| SANDRA M. MADRIGAL | AMBULATORY CARE NETWORK<br>Dept.# HN | 08-29-2026 | 39 YR, 4 MO |
| KARINE PAPELIAN | AMBULATORY CARE NETWORK<br>Dept.# HN | 08-29-2026 | 25 YR, 5 MO |
| MALTI P. SHAH | AMBULATORY CARE NETWORK<br>Dept.# HN | 11-28-2026 | 22 YR, 1 MO |
| DENISE F. WILSON | AMBULATORY CARE NETWORK<br>Dept.# HN | 10-30-2026 | 27 YR, 6 MO |
| EL CID DE RAMUS | ASSESSOR<br>Dept.# AS | 10-15-2026 | 39 YR, 1 1/2 MO |
| ANDREA HAMMONDS | ASSESSOR<br>Dept.# AS | 10-30-2026 | 38 YR, 2 MO |
| YVONNE M. SOTO | ASSESSOR<br>Dept.# AS | 11-28-2026 | 42 YR, 0 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| EMMY WU | ASSESSOR<br>Dept.# AS | 11-28-2026 | 22 YR, 8 MO |
| MARK E. CHRISTENSEN | AUDITOR - CONTROLLER<br>Dept.# AU | 11-18-2026 | 20 YR, 3 MO |
| MARIA A. GARCIA | AUDITOR - CONTROLLER<br>Dept.# AU | 11-28-2026 | 36 YR, 8 MO |
| SHAJUNIA M. INGRAM | AUDITOR - CONTROLLER<br>Dept.# AU | 11-28-2026 | 39 YR, 11 MO |
| SUNG C. LEE | AUDITOR - CONTROLLER<br>Dept.# AU | 10-31-2026 | 13 YR, 0 MO |
| MELISSA D. MURILLO | AUDITOR - CONTROLLER<br>Dept.# AU | 11-28-2026 | 30 YR, 2 MO |
| BRENDA S. POWERS | AUDITOR - CONTROLLER<br>Dept.# AU | 11-01-2026 | 25 YR, 7 MO |
| JAMES J. SOKALSKI | CHIEF EXECUTIVE OFFICE<br>Dept.# AO | 11-28-2026 | 34 YR, 9 MO |
| IRISH WONG | CHIEF EXECUTIVE OFFICE<br>Dept.# AO | 11-04-2026 | 34 YR, 9 1/2 MO |
| BERTHA ESCHAGARY | CHILD SUPPORT SERVICES<br>Dept.# CD | 11-28-2026 | 21 YR, 10 MO |
| RODOLFO L. MOLINA | CHILD SUPPORT SERVICES<br>Dept.# CD | 10-21-2026 | 7 YR, 10 MO |
| SALLY THAI | CHILD SUPPORT SERVICES<br>Dept.# CD | 11-30-2026 | 24 YR, 10 MO |
| REGINA M. WILSON | CHILD SUPPORT SERVICES<br>Dept.# CD | 10-31-2026 | 33 YR, 2 MO |
| YOLANDA BIDDLE | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-06-2026 | 41 YR, 10 1/2 MO |
| HUYEN B. BUI | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 12-01-2026 | 38 YR, 4 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| SONYA FIFE | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 12-01-2026 | 36 YR, 10 MO |
| VERONICA GIBSON | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-28-2026 | 29 YR, 3 MO |
| CHIOKE NAYO | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 10-13-2026 | 29 YR, 11 1/2 MO |
| MARYJANE OLIVEROS | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-29-2026 | 41 YR, 9 MO |
| KIM T. PHOU | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 10-29-2026 | 37 YR, 0 MO |
| CHRISTINA PINTO | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 09-25-2026 | 26 YR, 10 1/2 MO |
| GRACE M. TAMASE | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 12-01-2026 | 38 YR, 8 MO |
| SHEREDA T. USHER | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-28-2026 | 20 YR, 1 MO |
| MIGUEL R. VASCONEZ | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-28-2026 | 8 YR, 7 MO |
| LINDA L. WEBB | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-28-2026 | 48 YR, 4 MO |
| TRACY M. WILSON | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 11-28-2026 | 26 YR, 6 1/2 MO |
| SHEELA P. CORNELIUS | COASTAL CLUSTER-<br>HARBOR/UCLA MC<br>Dept.# HH | 10-15-2026 | 6 YR, 7 MO |
| NANNETTE N. JACKSON | COASTAL CLUSTER-<br>HARBOR/UCLA MC<br>Dept.# HH | 10-31-2026 | 47 YR, 2 MO |
| ANNETTE C. JUAREZ-FLORES | COASTAL CLUSTER-<br>HARBOR/UCLA MC<br>Dept.# HH | 11-28-2026 | 25 YR, 0 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| DEMETRIS M. MARTIN | COASTAL CLUSTER-HARBOR/UCLA MC<br>Dept.# HH | 11-28-2026 | 39 YR, 5 MO |
| LOIDA JUANITA E. QUERIDO | COASTAL CLUSTER-HARBOR/UCLA MC<br>Dept.# HH | 11-30-2026 | 20 YR, 0 MO |
| VANESSA A. WILLIAMS | COASTAL CLUSTER-HARBOR/UCLA MC<br>Dept.# HH | 11-28-2026 | 29 YR, 3 MO |
| JOSE P. ARELLANO | DEPARTMENT OF HUMAN RESOURCES<br>Dept.# HM | 10-05-2026 | 34 YR, 10 1/2 MO |
| LETICIA LOYA | DEPT OF HOMELESS SERV & HOUSIN<br>Dept.# DH | 11-28-2026 | 36 YR, 7 MO |
| CAROL L. ACUNA | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 35 YR, 0 MO |
| TOMAS F. ALLEN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 10-31-2026 | 25 YR, 0 MO |
| NORA ANDERIASIAN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 28 YR, 0 MO |
| RENEE L. AUSBY | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 10-19-2026 | 18 YR, 4 MO |
| STACEY L. BOYKIN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 33 YR, 2 1/2 MO |
| ROCHELLE Y. BURTON-SPIVEY | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 12-31-2026 | 26 YR, 1 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| CAROL D. BYOUS | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 34 YR, 3 MO |
| EVELYN M. DIAZ | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 25 YR, 11 MO |
| MARTHA S. ELIAS-BULNES | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 27 YR, 0 MO |
| DINA B. GHOMESHI | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 20 YR, 4 MO |
| BRIAN M. HOANG | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-30-2026 | 25 YR, 5 MO |
| VERONICA B. JIMENEZ | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 29 YR, 2 MO |
| MARIAM KARAPETYAN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-18-2026 | 25 YR, 7 MO |
| MARITA KESHISHI | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 12-01-2026 | 20 YR, 0 MO |
| MARJORIE J. KINDLE | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 27 YR, 0 MO |
| GARETH S. LEE | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 10-01-2026 | 28 YR, 7 MO |
| HOA C. LY | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 40 YR, 3 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| NHI V. MACH | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 41 YR, 2 MO |
| DANA R. RODGERS | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 10-31-2026 | 25 YR, 10 1/2 MO |
| KATRINEH SARKISIAN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 25 YR, 5 MO |
| ESTER TAMAYO | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 10-30-2026 | 56 YR, 4 MO |
| HECTOR VELAZQUEZ | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 27 YR, 4 MO |
| QIN WANG | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-28-2026 | 19 YR, 0 1/2 MO |
| LIBBY BROWN | DISTRICT ATTORNEY<br>Dept.# DA | 11-19-2026 | 38 YR, 0 MO |
| JENNIFER NGO | ECONOMIC AND WORKFORCE DEV<br>Dept.# EW | 10-31-2026 | 37 YR, 1 MO |
| SLAVA ADENYAYEV | HEALTH SERVICES ADMINISTRATION<br>Dept.# HS | 11-14-2026 | 18 YR, 0 1/2 MO |
| CATHY D. CORNELIOUS | HEALTH SERVICES ADMINISTRATION<br>Dept.# HS | 11-28-2026 | 42 YR, 2 MO |
| SUSANA M. MENDOZA | HEALTH SERVICES ADMINISTRATION<br>Dept.# HS | 11-28-2026 | 10 YR, 9 MO |
| SHAHEN AGHAKHANI | INTERNAL SERVICES<br>Dept.# IS | 10-31-2026 | 14 YR, 0 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| JOHN C. GUERRA | INTERNAL SERVICES<br>Dept.# IS | 11-28-2026 | 36 YR, 4 MO |
| ELIZABETH L. HART BOGNER | INTERNAL SERVICES<br>Dept.# IS | 11-28-2026 | 25 YR, 0 MO |
| JOSE F. MIER | INTERNAL SERVICES<br>Dept.# IS | 10-05-2026 | 6 YR, 3 MO |
| ELIZABETH R. NELSON | INTERNAL SERVICES<br>Dept.# IS | 10-31-2026 | 31 YR, 0 MO |
| JOANNE J. KANG | JUSTICE, CARE & OPPORTUNITIES<br>Dept.# JC | 11-13-2026 | 10 YR, 0 1/2 MO |
| GAIL A. ELLIS | JUVENILE COURT HEALTH SERVICES<br>Dept.# HJ | 10-31-2026 | 46 YR, 11 MO |
| PASCAL D'SOUZA | L A COUNTY FIRE DEPT<br>Dept.# FR | 11-30-2026 | 37 YR, 10 MO |
| JACQUELINE LINCOLN | L A COUNTY FIRE DEPT<br>Dept.# FR | 11-28-2026 | 38 YR, 0 MO |
| MARYLOU O. SOSA | L A COUNTY FIRE DEPT<br>Dept.# FR | 11-10-2026 | 20 YR, 2 1/2 MO |
| EZAKAR BIGILINKA | MENTAL HEALTH<br>Dept.# MH | 11-28-2026 | 10 YR, 9 MO |
| DEMETRIS A. BROWN | MENTAL HEALTH<br>Dept.# MH | 08-27-2026 | 17 YR, 9 MO |
| BART C. CALLENDER | MENTAL HEALTH<br>Dept.# MH | 10-30-2026 | 38 YR, 0 MO |
| TERESA DAVIS-BROWN | MENTAL HEALTH<br>Dept.# MH | 10-30-2026 | 27 YR, 2 MO |
| LEE M. GOMBERG | MENTAL HEALTH<br>Dept.# MH | 10-31-2026 | 33 YR, 8 MO |
| ROSALIND A. KNOX | MENTAL HEALTH<br>Dept.# MH | 11-30-2026 | 40 YR, 9 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| MAYRA E. MACHUCA | MENTAL HEALTH<br>Dept.# MH | 11-16-2026 | 10 YR, 0 MO |
| LILIANA PALACINO | MENTAL HEALTH<br>Dept.# MH | 11-28-2026 | 18 YR, 0 MO |
| MARIAM YESAYAN | MENTAL HEALTH<br>Dept.# MH | 10-31-2026 | 26 YR, 2 MO |
| YVETTE M. ARMENTA | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 09-29-2026 | 23 YR, 11 MO |
| LETITIA A. DONALDSON | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 11-30-2026 | 25 YR, 6 1/2 MO |
| PATRICIA H. KAWASAKI | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 12-05-2026 | 28 YR, 8 1/2 MO |
| SOCORRO C. MUNOZ | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 11-28-2026 | 12 YR, 7 MO |
| LUPITA PEREZ | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 11-28-2026 | 13 YR, 3 MO |
| ALBERT J. SOLIS | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 09-17-2026 | 17 YR, 1 1/2 MO |
| MICHAELA A. WARD | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 10-02-2026 | 31 YR, 7 MO |
| MICHAEL WISNIEWSKI | NORTHEAST CLUSTER<br>(LAC+USC)<br>Dept.# HG | 11-28-2026 | 29 YR, 10 MO |
| LEAH A. FERRASSOLI | PARKS AND RECREATION<br>Dept.# PK | 11-28-2026 | 20 YR, 1 MO |
| SEAN W. GORMAN | PARKS AND RECREATION<br>Dept.# PK | 11-28-2026 | 20 YR, 6 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| GREGORY ROGERS | PARKS AND RECREATION<br>Dept.# PK | 11-30-2026 | 25 YR, 0 MO |
| SYNTOSHIA L. CUNNINGHAM | PROBATION DEPARTMENT<br>Dept.# PB | 10-01-2026 | 23 YR, 10 1/2 MO |
| JOSEPH M. DELFIN | PROBATION DEPARTMENT<br>Dept.# PB | 10-26-2026 | 32 YR, 1 MO |
| VICTORIA L. DOUGLAS-GORY | PROBATION DEPARTMENT<br>Dept.# PB | 10-20-2026 | 20 YR, 10 1/2 MO |
| MICHELLE R. HOCHSTEIN | PROBATION DEPARTMENT<br>Dept.# PB | 10-31-2026 | 22 YR, 3 MO |
| LOUISE E. RINKER | PROBATION DEPARTMENT<br>Dept.# PB | 11-28-2026 | 25 YR, 0 MO |
| BRUCE A. VILLA | PROBATION DEPARTMENT<br>Dept.# PB | 11-28-2026 | 32 YR, 3 MO |
| HAI K. VUONG | PROBATION DEPARTMENT<br>Dept.# PB | 11-27-2026 | 25 YR, 1 MO |
| TYRONE WEDGWORTH | PROBATION DEPARTMENT<br>Dept.# PB | 12-01-2026 | 35 YR, 10 1/2 MO |
| LATRICE I. WHITE | PROBATION DEPARTMENT<br>Dept.# PB | 09-16-2026 | 32 YR, 2 MO |
| YANNASHET M. WOODS | PROBATION DEPARTMENT<br>Dept.# PB | 11-28-2026 | 31 YR, 8 1/2 MO |
| CHERYL D. FRANKLIN | PUBLIC DEFENDER<br>Dept.# PD | 11-28-2026 | 37 YR, 3 MO |
| EDWIN MENDEZ | PUBLIC DEFENDER<br>Dept.# PD | 11-30-2026 | 18 YR, 6 MO |
| MAUREEN T. PACHECO | PUBLIC DEFENDER<br>Dept.# PD | 11-28-2026 | 35 YR, 1 MO |
| REGINA K. CHENG | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-28-2026 | 24 YR, 0 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| LAN LAM | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-27-2026 | 25 YR, 7 MO |
| VINNIE LIU | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 10-31-2026 | 12 YR, 7 MO |
| LUCILLE M. RAYFORD | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-28-2026 | 25 YR, 0 MO |
| JONICA M. RIVAS | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-28-2026 | 27 YR, 1 MO |
| JENNIFER A. SANTORO | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 10-30-2026 | 33 YR, 1 MO |
| YVONNE TANG | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-01-2026 | 30 YR, 0 MO |
| KATHY TON | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-28-2026 | 30 YR, 3 MO |
| MONICA UDELL | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-28-2026 | 31 YR, 10 MO |
| MELVIN K. WONG | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 12-01-2026 | 22 YR, 1 MO |
| ASHWINI D. JAMBOTKAR | PUBLIC LIBRARY<br>Dept.# PL | 11-28-2026 | 30 YR, 0 MO |
| TERRI D. ALEX | PUBLIC WORKS<br>Dept.# PW | 11-28-2026 | 39 YR, 7 MO |
| ALEXANDER ANGUSTAIN | PUBLIC WORKS<br>Dept.# PW | 11-30-2026 | 35 YR, 0 1/2 MO |
| MARTHA A. GALLEGOS | PUBLIC WORKS<br>Dept.# PW | 11-28-2026 | 41 YR, 1 MO |
| LINDA HERNANDEZ | PUBLIC WORKS<br>Dept.# PW | 11-30-2026 | 27 YR, 4 MO |
| MARCUS JONES | PUBLIC WORKS<br>Dept.# PW | 10-31-2026 | 34 YR, 8 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| DESMOND H. LEW | PUBLIC WORKS<br>Dept.# PW | 09-24-2026 | 0 YR, 11 MO |
| STEVEN C. MEDLOCK | PUBLIC WORKS<br>Dept.# PW | 10-31-2026 | 23 YR, 6 MO |
| KENNETH R. PERGESON | PUBLIC WORKS<br>Dept.# PW | 10-01-2026 | 4 YR, 10 MO |
| ADELLE ESQUIVEL | RANCHO LOS AMIGOS HOSPITAL<br>Dept.# HR | 11-29-2026 | 26 YR, 0 MO |
| SANDRA S. NUNEZ | RANCHO LOS AMIGOS HOSPITAL<br>Dept.# HR | 11-28-2026 | 17 YR, 3 MO |
| JANN L. WILLIAMS | RANCHO LOS AMIGOS HOSPITAL<br>Dept.# HR | 10-31-2026 | 29 YR, 3 MO |
| ZALDY A. QUINONES | REG-RECORDER/COUNTY CLERK<br>Dept.# RR | 11-28-2026 | 32 YR, 4 MO |
| VICTOR RAMIREZ | REG-RECORDER/COUNTY CLERK<br>Dept.# RR | 11-25-2026 | 32 YR, 2 MO |
| DIANA I. VILLAREAL | REG-RECORDER/COUNTY CLERK<br>Dept.# RR | 11-28-2026 | 28 YR, 10 MO |
| MARIA E. ACEVEDO | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 10-17-2026 | 12 YR, 2 1/2 MO |
| HOLLY A. BIANCO | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 10-31-2026 | 27 YR, 10 2/5 MO |
| LUCINA S. CAMPOS | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 10-31-2026 | 25 YR, 8 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| EMMA G. DEARINGER | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 11-30-2026 | 10 YR, 0 MO |
| GRACE M. KELLER | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 11-30-2026 | 28 YR, 6 MO |
| QUANG D. NGUYEN | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 11-29-2026 | 32 YR, 8 MO |
| KATHLEEN D. SINGER | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 11-28-2026 | 39 YR, 6 MO |
| ANDREW L. WONG | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 12-01-2026 | 36 YR, 7 MO |
| ROBBI AARON | SHERIFF<br>Dept.# SH | 10-31-2026 | 36 YR, 3 MO |
| SUZANNE M. ETTER | SHERIFF<br>Dept.# SH | 10-31-2026 | 26 YR, 6 MO |
| GWENDOLYN R. JONES | SHERIFF<br>Dept.# SH | 11-28-2026 | 32 YR, 5 MO |
| PATRICK P. LUI | SHERIFF<br>Dept.# SH | 12-13-2026 | 23 YR, 4 MO |
| MICHAEL C. NAGEL | SHERIFF<br>Dept.# SH | 11-30-2026 | 26 YR, 0 MO |
| IRMA M. RODRIGUEZ | SHERIFF<br>Dept.# SH | 11-30-2026 | 42 YR, 0 MO |
| GREGORY W. SIVARD | SHERIFF<br>Dept.# SH | 11-29-2026 | 46 YR, 1 MO |
| KIM-LIEN T. TRAN | SHERIFF<br>Dept.# SH | 11-28-2026 | 25 YR, 0 MO |
| CHEANNIE TUIASOSOPO | SHERIFF<br>Dept.# SH | 09-30-2026 | 36 YR, 10 1/2 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| BRIGGETTE A. YBARRA-SILVA | SHERIFF<br>Dept.# SH | 09-30-2026 | 24 YR, 8 1/2 MO |
| AMY BISHOP | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 10-31-2026 | 28 YR, 11 13/16 MO |
| LISA L. BRISENO | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 10-22-2026 | 27 YR, 11 MO |
| ERICA R. COLLURA | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 09-30-2026 | 25 YR, 5 MO |
| JEFFREY DOMINGUEZ | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 11-28-2026 | 30 YR, 0 MO |
| LUCY I. MILIVOJEVIC | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 10-31-2026 | 26 YR, 8 MO |
| ANTOINETTE MORALES | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 11-28-2026 | 29 YR, 5 MO |
| PRAVINCHANDRA G. PARMAR | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 11-28-2026 | 24 YR, 7 MO |
| STEVEN REESE | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 10-19-2026 | 19 YR, 1 MO |
| CATHERINE A. ZINK | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 09-28-2026 | 34 YR, 4 MO |
| LISA PROFT | TREASURER AND TAX COLLECTOR<br>Dept.# TT | 01-19-2027 | 29 YR, 6 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## SAFETY SURVIVOR APPLICATIONS

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| Guadalupe Y. Lavoie | SHERIFF<br>Dept.# SH | 07-08-2026 | 25 YR, 10 1/2 MO |
| SPOUSE of<br>Robert A. Lavoie Jr<br>dec'd on 07-07-2026<br>Sect. #31781.3 | | | |
| Kelsey D. Crawford | SHERIFF<br>Dept.# SH | 08-30-2026 | 18 YR, 10 MO |
| SPOUSE of<br>Nicholas S. Crawford<br>dec'd on 08-29-2026<br>Sect. #31781.3 | | | |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL SURVIVOR APPLICATIONS

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| Martha Graciela Serrano Partida | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 05-27-2026 | 20 YR, 11 MO |
| SPOUSE of<br>Pedro Mendez<br>dec'd on 05-26-2026<br>Sect. #31781.3 | | | |
| Meliton Valenzuela | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 09-01-2026 | 28 YR, 1 MO |
| SPOUSE of<br>Elizabeth Valenzuela<br>dec'd on 08-31-2026<br>Sect. #31781.1 | | | |
| Sharla Martin | PROBATION DEPARTMENT<br>Dept.# PB | 08-21-2026 | 33 YR, 7 MO |
| SPOUSE of<br>Raul Reyna<br>dec'd on 08-20-2026<br>Sect. #31781.3 | | | |
| Donald D. Razzano | SHERIFF<br>Dept.# SH | 08-09-2026 | 19 YR, 9 1/2 MO |
| HUSBAND of<br>Glenda L. Razzano<br>dec'd on 08-08-2026<br>Sect. #31781.1 | | | |
| Sinuhe Villegas | SHERIFF<br>Dept.# SH | 08-28-2026 | 25 YR, 6 MO |
| SPOUSE of<br>Lorena Villegas<br>dec'd on 08-27-2026<br>Sect. #31781.3 | | | |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL SURVIVOR APPLICATIONS

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| LINDA E. EVANS | SHERIFF<br>Dept.# SH | 09-30-2026 | 6 YR, 2 MO |
| ALLEN R. LEMUS | SHERIFF<br>Dept.# SH | 12-24-2026 | 3 YR, 11 MO |
| RAFAEL A. ZELAYA | SHERIFF<br>Dept.# SH | 10-31-2026 | 5 YR, 8 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| MATT ANDERSON | ANIMAL CONTROL<br>Dept.# AN | 10-20-2026 | 6 YR, 9 MO |
| KENNY D. KIM | ASSESSOR<br>Dept.# AS | 09-30-2026 | 8 YR, 3 MO |
| STEPHEN RYAN | CALIFORNIA CHILDREN'S SERVICES<br>Dept.# PS | 10-07-2026 | 5 YR, 6 MO |
| STACY Y. PIPES-JOYNER | CHILDREN & FAMILY SERVICES<br>Dept.# CH | 10-03-2026 | 11 YR, 3 1/2 MO |
| LI RONG GUAN | COASTAL CLUSTER-HARBOR/UCLA MC<br>Dept.# HH | 10-06-2026 | 7 YR, 9 MO |
| CONSTANCE L. HAMILTON | COASTAL CLUSTER-HARBOR/UCLA MC<br>Dept.# HH | 09-25-2026 | 18 YR, 7 MO |
| TRACY FAN | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 11-03-2026 | 4 YR, 6 MO |
| MARIO J. MEJIA | DEPT OF PUBLIC SOCIAL SERVICES<br>Dept.# SS | 09-28-2026 | 34 YR, 8 MO |
| ADAM Y. CHANG | DISTRICT ATTORNEY<br>Dept.# DA | 10-28-2026 | 6 YR, 11 1/2 MO |
| RITA WILLIAMS | INTERNAL SERVICES<br>Dept.# IS | 11-01-2026 | 7 YR, 6 MO |
| ANGELA F. LUBEN | JUSTICE, CARE & OPPORTUNITIES<br>Dept.# JC | 10-24-2026 | 17 YR, 4 MO |
| GUILLERMO U. RAMIREZ | MENTAL HEALTH<br>Dept.# MH | 11-05-2026 | 26 YR, 7 MO |
| NICOLE M. WRIGHT | MENTAL HEALTH<br>Dept.# MH | 09-09-2026 | 6 YR, 11 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| JOHN W. TWILLEY | MUSEUM OF ART<br>Dept.# AR | 10-01-2026 | 13 YR, 0 MO |
| GLORIA P. BANDOSINGH | NORTHEAST CLUSTER (LAC+USC)<br>Dept.# HG | 09-24-2026 | 22 YR, 4 1/2 MO |
| SHANNON L. HAGGERTY | NORTHEAST CLUSTER (LAC+USC)<br>Dept.# HG | 09-29-2026 | 6 YR, 2 MO |
| PAMELA R. JOHNSON | NORTHEAST CLUSTER (LAC+USC)<br>Dept.# HG | 11-30-2026 | 31 YR, 7 MO |
| ELAINE BURGESS | PARKS AND RECREATION<br>Dept.# PK | 11-25-2026 | 27 YR, 1 MO |
| SELESTINO A. MERCADO | PARKS AND RECREATION<br>Dept.# PK | 09-17-2026 | 6 YR, 6 1/2 MO |
| GLENN P. NOLER | PARKS AND RECREATION<br>Dept.# PK | 10-30-2026 | 9 YR, 8 1/2 MO |
| MICHELLE L. DAVIDHOFF | PROBATION DEPARTMENT<br>Dept.# PB | 10-16-2026 | 15 YR, 6 MO |
| VICTORIA L. RODRIQUEZ | PROBATION DEPARTMENT<br>Dept.# PB | 10-29-2026 | 27 YR, 0 MO |
| ADRIANNE D. SMITH | PROBATION DEPARTMENT<br>Dept.# PB | 09-21-2026 | 26 YR, 6 MO |
| CORIN MARINA TOBIAS-PADILLA | PROBATION DEPARTMENT<br>Dept.# PB | 10-01-2026 | 11 YR, 7 MO |
| TANYA R. WILLIAMS | PROBATION DEPARTMENT<br>Dept.# PB | 01-01-2026 | 17 YR, 10 MO |
| YVONNE R. RODRIGUEZ | PUBLIC DEFENDER<br>Dept.# PD | 10-01-2026 | 7 YR, 7 1/2 MO |
| ALEJANDRA NOVELO | PUBLIC HEALTH PROGRAM<br>Dept.# PH | 11-22-2026 | 33 YR, 4 1/2 MO |

# BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026

## BENEFIT APPROVAL LIST

## GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

| NAME | DEPARTMENT | RETIRED | SERVICE |
|---|---|---|---|
| XIAO-LING ZHANG | RANCHO LOS AMIGOS HOSPITAL<br>Dept.# HR | 10-13-2026 | 18 YR, 5 1/2 MO |
| ANA C. FLORES | SFV CLUSTER-OLIVE VIEW/UCLA MC<br>Dept.# HO | 11-23-2026 | 18 YR, 9 MO |
| CYNTHIA A. CAPMANY | SHERIFF<br>Dept.# SH | 10-15-2026 | 12 YR, 6 MO |
| DEREK KHUU | SHERIFF<br>Dept.# SH | 09-18-2026 | 5 YR, 9 MO |
| PETER V. FITZPATRICK | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 10-16-2026 | 10 YR, 9 1/10 MO |
| MICHELE E. FLURER | SUPERIOR COURT/COUNTY CLERK<br>Dept.# SC | 09-17-2026 | 4 YR, 5 1/2 MO |

**BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026**
**RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

**SAFETY MEMBER APPLICATIONS FOR SERVICE RETIRMENT**

| NAME | DEPARTMENT | UPDATE |
|---|---|---|
| HAROLD S. FRAYER | SHERIFF | CHANGE OF DATE TO December 22, 2026 |
| DEBORAH A. GALLEGO | SHERIFF | CHANGE OF DATE TO December 04, 2026 |
| RICARDO LANGARICA | SHERIFF | CHANGE OF DATE TO January 01, 2027 |
| ARTHUR C. VELASQUEZ | SHERIFF | CHANGE OF DATE TO November 06, 2026 |

**BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026**
**RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

**GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT**

| NAME | DEPARTMENT | UPDATE |
|---|---|---|
| PAMELA Y. GREEN CRAWFORD | AMBULATORY CARE NETWORK | CHANGE OF DATE TO October 31, 2026 |
| MARGARET Z. BELTRAN | CHILDREN & FAMILY SERVICES | RESCISSION OF RETIREMENT |
| YUNG SU CHOE-GARVEY | CHILDREN & FAMILY SERVICES | CHANGE OF DATE TO October 31, 2026 |
| ALEJANDRA GOMEZTAGLE | CHILDREN & FAMILY SERVICES | CHANGE OF DATE TO October 24, 2026 |
| BECKY MCCLELLAND-BUSH | CHILDREN & FAMILY SERVICES | CHANGE OF DATE TO October 15, 2026 |
| ANN M. AGUILAR | COUNTY COUNSEL | CHANGE OF DATE TO November 15, 2026 |
| JAIME E. BAQUERO | DEPT OF PUBLIC SOCIAL SERVICES | CHANGE OF DATE TO January 09, 2027 |
| BANG DAO | DEPT OF PUBLIC SOCIAL SERVICES | RESCISSION OF RETIREMENT |
| ANGEL G. ESCOBEDO | DEPT OF PUBLIC SOCIAL SERVICES | CHANGE OF DATE TO October 02, 2026 |
| NAIRA GASPARIAN | DEPT OF PUBLIC SOCIAL SERVICES | CHANGE OF DATE TO December 31, 2026 |
| BISRAT GEBREGIORGIS | DEPT OF PUBLIC SOCIAL SERVICES | CHANGE OF DATE TO December 31, 2026 |
| SHOGIK PETROSYAN | DEPT OF PUBLIC SOCIAL SERVICES | CHANGE OF DATE TO January 11, 2027 |

## BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026
## RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS

### GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

| NAME | DEPARTMENT | UPDATE |
|---|---|---|
| NATASHA COOPER | DISTRICT ATTORNEY | CHANGE OF DATE TO November 13, 2026 |
| LEA R. MALIT-CRISOSTOMO | DISTRICT ATTORNEY | CHANGE OF DATE TO December 15, 2026 |
| YOUNG J. PEAK | HEALTH SERVICES ADMINISTRATION | CHANGE OF DATE TO December 31, 2026 |
| HILARIE M. BAUMGARTEN | MENTAL HEALTH | CHANGE OF DATE TO December 01, 2026 |
| DIANE ALARCON | PARKS AND RECREATION | RESCISSION OF RETIREMENT |
| ALICE L. BOULTON | PROBATION DEPARTMENT | CHANGE OF DATE TO November 03, 2026 |
| CHRISTINE M. THAI | PROBATION DEPARTMENT | CHANGE OF DATE TO January 18, 2027 |
| ELAINE T. VALDEZ | PROBATION DEPARTMENT | CHANGE OF DATE TO November 27, 2026 |
| EILEEN JAMES | PUBLIC HEALTH PROGRAM | CHANGE OF DATE TO November 28, 2026 |
| GRACE C. JIN | PUBLIC HEALTH PROGRAM | CHANGE OF DATE TO November 30, 2026 |
| EMY OKOHIRA | PUBLIC HEALTH PROGRAM | CHANGE OF DATE TO December 28, 2026 |
| CYNTHIA S. LASTER | PUBLIC LIBRARY | CHANGE OF DATE TO November 08, 2026 |
| PAIGE B. VAUGHAN | PUBLIC WORKS | RESCISSION OF RETIREMENT |

## BOARD OF RETIREMENT MEETING OF NOVEMBER 4, 2026
## RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS

### GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

| NAME | DEPARTMENT | UPDATE |
|---|---|---|
| LORI C. WARREN | SFV CLUSTER-OLIVE VIEW/UCLA MC | CHANGE OF DATE TO October 02, 2026 |
| JAMES G. CURRAN | SHERIFF | RESCISSION OF RETIREMENT |
| ANGELO P. TRAMONTANO | SHERIFF | CHANGE OF DATE TO January 03, 2027 |
| STACY A. COLLINS | SUPERIOR COURT/COUNTY CLERK | RESCISSION OF RETIREMENT |

October 20, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manage
Disability Retirement Services

SUBJECT: **APPEAL FOR THE BOARD OF RETIREMENT'S MEETING OF NOVEMBER 4, 2026**

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

| | | | |
|---|---|---|---|
| 5500B | Annie M. Murray | In Pro Per | Deny SCD |

TLC:kw

LACERA

October 5, 2026

TO: Trustees – Board of Retirement

FROM: Jean J. Kim
Senior Staff Counsel

DATE: Board of Retirement Meeting of November 4, 2026

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

**INTRODUCTION**
This memorandum addresses a new pay item 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 new pay item at issue:

Waterworks Division Assignment Bonus (Item No. 659)

**Recommendation:**
Include in compensation earnable for legacy members.
Include in pensionable compensation for PEPRA members.

A summary of the new pay code 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 ITEM**

Waterworks Division Assignment Bonus (Item No. 659)

This pay item provides an assignment bonus of 5.5% to all employees in Bargaining Units 411 and 412, in the classifications indicated, who are permanently assigned to the Waterworks Division of the Department of Public Works.

For legacy members, this pay item qualifies as compensation earnable because 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) none of the exclusions under Cal. Govt. Code § 31461(b) apply.

For PEPRA members, this pay item qualifies as pensionable compensation because it is a component of the normal monthly rate of pay that will be paid to all similarly situated members of the same group of employment, all employees who are in Bargaining Units 411 and 412, in the classifications listed, who are permanently assigned to the Waterworks Division of the Department of Public Works.

**Recommendation:**
Include in compensation earnable for legacy members.
Include in pensionable compensation for PEPRA members.

**CONCLUSION**

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

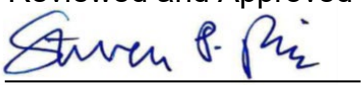
1. Approve the recommendations set forth above as to the new pay item.

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.

For reference, the complete lists of pay codes that the Board has determined to be pensionable or not pensionable under CERL and under PEPRA 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 PEPRA 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 Sections 31461 and 7522.34** | | | | | |
| 659 | **WATERWORKS DIVISION ASSIGNMENT BONUS** | Effective October 1, 2026, employees in Bargaining Units 411 and 412 holding one of the classifications listed below who are permanently assigned to the Waterworks Division of the Department of Public Works shall receive an assignment bonus of 5.5% in addition to their base salary. The bonus shall automatically end on the last day the employee is assigned to and performing services for Waterworks.<br><br>**Eligible Classifications**<br><br>• Assistant Electro-Mechanic (Item 6490)<br>• Electro-Mechanic Supervisor (Item 6498)<br>• Electro-Mechanic (Item 6492)<br>• Electro-Mechanic Working Supervisor (Item 6495)<br>• Regional Water Service Superintendent (Item 7857)<br>• Senior Water Service Worker (Item 7852)<br>• Water Service Helper I (Item 7847)<br>• Water Service Helper II (Item 7848)<br>• Water Service Worker (Item 7849)<br>• Water Service Supervisor (Item 7856)<br>• Helper, Electrical (Item 6349) | (a)(1) | (a) | This compensation is paid to members in Bargaining Units 411 and 412 employed under the identified classifications who are permanently assigned to the Waterworks Division. This payment is made to employees in the same grade or class of positions and at the same rate of pay. The recommendation is to INCLUDE this payment in compensation earnable for legacy members.<br><br>This compensation is a component of the normal monthly rate of pay that is paid in cash to all similarly situated members of the same group of employment pursuant to publicly available pay schedules. The recommendation is to INCLUDE this payment in pensionable compensation for PEPRA members. |

LACERA

October 21, 2026

TO: Each Member
Board of Retirement

FROM: Insurance, Benefits and Legislative Committee
Les Robbins, Chair
Aleen Langton, Vice Chair
Ernesto J. Pantoja
Shawn R. Kehoe
Jason Green, Alternate

FOR: November 4, 2026, Board of Retirement Meeting

SUBJECT: **Legislative Proposal—Prepaid Card Accounts**

**RECOMMENDATION**
That the Board of Retirement sponsor legislation for the 2027 legislative year to extend or repeal the sunset date of LACERA's prepaid card program.

**BACKGROUND**
LACERA's retirement benefits are by default paid to retired members and beneficiaries by means of a paper check. Many retired members and beneficiaries authorize the payment of benefits to be directly deposited by electronic transfer into their account at a bank, savings and loan, or credit union.

The COVID-19 pandemic caused disruptions in the delivery of mail and revealed the risks of receiving paper checks either due to delays in mail service or limited in-person access to pick up and cash a check.

The disbursement of benefits through direct deposit presupposes that retired members and beneficiaries have an account at a financial institution. However, members who have challenges establishing such an account are limited at LACERA to receiving benefits through a paper check.

The use of paper checks and direct deposit revealed shortcomings in these two methods for disbursing retirement benefits during the pandemic. Consequently, in June 2022, LACERA released a Request for Proposal to provide prepaid card services that would enable LACERA to disburse benefits through a prepaid card and ensure that retired members receive their promised benefits continuously without interruption. In April 2023, the Board of Retirement selected a vendor to implement a prepaid card program at LACERA. LACERA was able to proceed with this program under the County Employees Retirement Law of 1937 (CERL) with appropriate safeguards, including member consent.

Although CERL provided that a member or beneficiary may authorize retirement benefits to be directly deposited into their account in a financial institution, it was silent as to

whether those benefits may be electronically deposited into a prepaid account. LACERA subsequently sponsored AB 2474 (2024), which added Government Code Sections 31452.61 and 31590.2 to clarify that a member may authorize their retirement benefits to be electronically deposited into a prepaid card.

However, due to concerns by committee consultants of the California State Legislature's retirement policy committees on the misuse of prepaid cards for unemployment benefits during the pandemic, they requested that more controls rather than just clarifications be included in the legislative framework. In addition to rights and protections for members, AB 2474 required that LACERA submit a report to the Assembly and Senate retirement committees on the program no later than November 30, 2027. Most notably, the prepaid card program was to sunset on January 1, 2028.

LACERA launched the prepaid card program on November 1, 2025. At that time, there were 1,258 retirees and beneficiaries receiving paper checks. As of July 31, 2026, there are 1,072 receiving paper checks and 127 who are enrolled in the prepaid card program.

**LEGISLATIVE POLICY STANDARD**
The Board of Retirement's legislative policy standard is to support proposals that provide clarification, technical updates, or conforming changes to CERL, the California Public Employees' Pension Reform Act of 2013, or other applicable provisions under California law related to public retirement systems. (Legislative Policy, page 6).

**ISSUE**
Staff acknowledges that the report would assist the retirement policy committees in assessing the effectiveness of the prepaid card program and will comply with the submission date of November 30, 2027. However, the sunset date of January 1, 2028, would not provide an opportunity for LACERA to continue the program based on a positive reception of the report if we do not begin the process of sponsoring a bill at the beginning of the 2027 legislative year to at the very least extend the sunset date.

**PROPOSED SOLUTION**
Government Code Sections 31452.61 and 31590.2 authorize the operation of a prepaid card program for LACERA, and these sections will sunset on January 1, 2028. To ensure that there is sufficient time for the retirement committee consultants to consider the report and whether the prepaid card program should continue, the sunset date of January 1, 2028, should either be extended or repealed.

**IT IS THEREFORE RECOMMENDED THAT THE BOARD** sponsor legislation for the 2027 legislative year to extend or repeal the sunset date of LACERA's prepaid card program.

**Attachments**
Government Code Sections 31452.61 and 31590.2

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Cynthia Martinez
Naomi Padron, McHugh Koepke Padron Government Relations

**State of California**

**GOVERNMENT CODE**

**Section 31452.61**

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31452.61. (a) (1) This section applies only to a retirement system in a county of the first class, as described in Sections 28020 and 28022.

(2) The board shall comply with and give effect to a revocable written authorization signed by a retired member or beneficiary of a retired member entitled to a retirement allowance or benefit under this chapter or the California Public Employees' Pension Reform Act of 2013, authorizing the treasurer or other entity authorized by the board to deliver the monthly warrant, check, or electronic fund transfer, for the retirement allowance or benefit to any specified bank, savings and loan institution, credit union, or prepaid account to be credited to the account of the retired member or survivor of a deceased retired member. That delivery is full discharge of the liability of the board to pay a monthly retirement allowance or benefit to the retired member or survivor of a deceased retired member.

(3) For purposes of this subdivision, a prepaid account shall have the same meaning as in Section 1339.1 of the Unemployment Insurance Code and shall meet the applicable requirements of that section to qualify under this subdivision.

(4) Prior to implementing the option to receive a retirement allowance or benefit by electronic fund transfer to a prepaid account pursuant to this section, the board shall develop a procedure to provide a retired member or beneficiary who elects the option all of the following:

(A) Access to a monthly statement detailing the retirement allowance or benefit amount and any deductions thereof.

(B) A reasonable process for the retired member or beneficiary to report and contest any error of the retirement allowance or benefit amount.

(C) Contact information for a responsible system ombudsperson to assist the retired member or beneficiary in recovering any amounts deducted from the net retirement allowance or benefit amount once it has been deposited in the account, resulting from an error or by fraud.

(b) Any payments directly deposited by electronic fund transfer following the date of death of a person who was entitled to receive a retirement allowance or benefit under this chapter or the California Public Employees' Pension Reform Act of 2013 shall be refunded to the retirement system.

(c) In order to obtain information from a financial institution following the death of a retired member or the beneficiary of a retired member, as provided in subdivision (o) of Section 7480, the board may certify in writing to the financial institution that the retired member or the beneficiary of a retired member has died and that transfers to the account of the retired member or beneficiary of a retired member at the financial

institution from the retirement system occurred after the date of death of the retired member or the beneficiary of a retired member.

(d) (1) No later than November 30, 2027, a retirement system of a county of the first class shall submit a report to the Assembly Committee on Public Employment and Retirement and the Senate Committee on Labor, Public Employment and Retirement that includes, but is not limited to, each of the following:

(A) A description of the history and need for a prepaid account to be offered as an option to the retirement system's retired members or their beneficiaries.

(B) A summary of the board of retirement system's processes and procedures to implement this section and Section 31590.2.

(C) The total number of all retired members of the retirement system.

(D) The total number of retired members of the retirement system who elected to have their retirement allowance under this chapter directly deposited into an account at a financial institution, as identified by the retired member.

(E) The total number of retired members of the retirement system who elected to have their retirement allowance provided by bank draft, such as a check.

(F) The total number of retired members of the retirement system who elected to have their retirement allowance deposited to a prepaid account, consistent with this section and Section 31590.2.

(G) Information detailing all costs to the retirement system with respect to implementing and administering the option of a prepaid account, consistent with this section and Section 31590.2, respectively.

(H) To the extent feasible, a summary of comments, feedback, or experiences received from a retired member who elected to have their retirement allowance deposited to a prepaid account card, consistent with this section and Section 31590.2, and with respect to obtaining, using, or the replacement of, a prepaid account card for their retirement allowance.

(2) The report pursuant to paragraph (1) shall be submitted in compliance with Section 9795.

(e) This section shall remain in effect only until January 1, 2028, and as of that date is repealed.

(Added by Stats. 2024, Ch. 108, Sec. 2. (AB 2474) Effective January 1, 2025. Repealed as of January 1, 2028, by its own provisions.)

**State of California**

**GOVERNMENT CODE**

**Section 31590.2**

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31590.2. (a) (1) This section applies only to a retirement system in a county of the first class, as described in Sections 28020 and 28022.

(2) All warrants, checks, and electronic fund transfers drawn on the retirement fund shall be signed or authorized by at least two board officers or employees, designated by the board or by the treasurer if designated by the board. If the treasurer is designated by the board, the board shall also designate the auditor to sign or authorize warrants, checks, and electronic fund transfers. The authorization may be by blanket authorization of all warrants, checks, or electronic fund transfers appearing on a list or register, or may be by a standing order to draw warrants, checks, or electronic fund transfers, which shall be good until revoked. If the treasurer and auditor are designated by the board, a warrant, check, or electronic fund transfer is not valid until it is signed or authorized, numbered, and recorded by the county auditor, except as provided in subdivision (c).

(b) Any person entitled to the receipt of benefits may authorize the payment of the benefits to be deposited as follows:

(1) Directly deposited by electronic fund transfer into the person's account at the financial institution of the person's choice under a program for direct deposit by electronic transfer established by the board or treasurer if authorized by the board. The direct deposit shall discharge the system's obligation in respect to that payment.

(2) Deposited into a prepaid account under a program for deposit into a prepaid account that is established by the board or by the treasurer if authorized by the board. That deposit shall discharge the system's obligation in respect to that payment. For purposes of this paragraph, a prepaid account shall have the same meaning as in Section 1339.1 of the Unemployment Insurance Code and shall meet the applicable requirements of that section to qualify under this paragraph.

(c) The board may, or, if authorized by the board, the treasurer shall, authorize a trust company or trust department of any state or national bank authorized to conduct the business of a trust company in this state or the Federal Reserve Bank of San Francisco or any branch thereof within this state, to process and issue payments by check or electronic fund transfer.

(d) This section shall remain in effect only until January 1, 2028, and as of that date is repealed.

(Added by Stats. 2024, Ch. 108, Sec. 3. (AB 2474) Effective January 1, 2025. Repealed as of January 1, 2028, by its own provisions.)

LACERA

**SUPPLEMENTAL AGENDA INFORMATION**

October 21, 2026

TO: Each Trustee
Board of Retirement

FROM: Barry W. Lew
Legislative Affairs Officer

FOR: November 4, 2026, Board of Retirement Meeting

SUBJECT: **Legislative Proposal—Prepaid Card Accounts**

Attached is a series of questions related to this agenda item that Trustee Langton sent to staff prior to the October 7, 2026, meeting of the Insurance, Benefits, and Legislative Committee. Staff was not able to obtain all of the information related to the questions in time for that meeting. They are attached for the board's consideration in relation to this agenda item.

**Reviewed and Approved:**

Cynthia Martinez

**Cynthia Martinez**
**Communications Director**

**Attachment**
Questions from Trustee Langton

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Naomi Padron, McHugh Koepke Padron Government Relations

1. **How long of an extension were you considering if we did not opt to repeal?**

   **Answer:**
   At least one year to January 1, 2029, to consider any changes to the program (and, if necessary, to the governing statutes) resulting from an assessment of the report provided to the Assembly and Senate retirement policy committees.

2. **Can you please provide a copy of the final internal procedures and/or procedures we sent to the members?**

   **Answer:**
   Our internal procedures will be provided to a trustee individually upon request.

3. **Can you please provide the enrollment breakdown by country?**

   **Answer:**

| Country | Enrollment Count |
|---|---|
| **USA** | 131 |
| **Canada** | 0 |
| **El Salvador** | 1 |
| **Honduras** | 0 |
| **Thailand** | 1 |
| **Ireland** | 2 |

**Note:** These figures are as of October 13, 2026, and the totals are subject to change.

4. **What are the costs or savings to LACERA from eliminating 127 checks?**

   **Answer:**

   Financial and Accounting Services Division advised that determining the full S&EB impact across multiple divisions would require a cost study. However, they provided an estimated State Street Bank processing fee of $0.16 per check.

5. **How much have members paid in fees directly related to the cards?**

   **Answer:**

   Conduent reported that LACERA members incurred **$2,228.51** in total fees from the program's inception through September 29, 2026.

6. **How many reports have we received and what were the issues (fraud, lost card, replacements, etc.)?**

   **Answer:**

| Issue Type | Count |
|---|---|
| **Replaced** | 0 |
| **Returned** | 2 |
| **Stolen** | 4 |
| **Lost** | 15 |
| **Damaged** | 8 |
| **Fraud Suspension** | 1 |
| **Non-Fraud Suspension** | 2 |
| **Closed*** | 56 |

**Note:** Members have discontinued use of the Prepaid Mastercard for several reasons, including activation issues, discomfort with using the card, and death. If a member receiving benefits through the PMC passes away, the card does not automatically transfer to the survivor. The survivor must enroll separately to receive benefits through the card. Members may contact Conduent directly to request a replacement card. In these cases, the old card is closed and reported as an account closure.

7. **Are there any countries where the card cannot be used or replaced?**

   **Answer:**

   Yes. Conduent-issued government benefit and disbursement cards, including the Way2Go Card® Debit Mastercard®, may be used worldwide wherever Mastercard is accepted. However, the cards cannot be used in countries subject to strict U.S. Office of Foreign Assets Control (OFAC) restrictions or international trade embargoes, including Iran, Syria, Sudan, North Korea, and Cuba, where U.S. financial and payment infrastructure is blocked.

   Bank-to-bank transfers remain limited because Conduent uses the ACH system. Transfers from a Prepaid Mastercard account to another bank account require both accounts to be held at U.S. financial institutions.

8. **Can you remind me what the issue was with wiring, PayPal or other programs?**

   **Answer:**

   **Wire Transfers**

   LACERA and State Street Bank do not have the infrastructure built to process wire transfers automatically. It requires manual processing by Financial and Accounting Services Division and there are fees involved for each one transaction. We simply can't support that for a large population.

   **PayPal or Other Programs**

   PayPal is generally not recommended as a primary solution for formal member benefit disbursements.

   **Key Risks and Limitations**

- **Payment and regulatory limitations:** PayPal is a payment processor rather than a dedicated benefit-disbursement platform and may not provide the controls, reporting, or regulatory support required for recurring retirement benefit payments.
- **Terms of service and compliance risks:** Using peer-to-peer payment methods for formal benefit disbursements may conflict with PayPal's terms of service and could trigger anti-money laundering reviews, account restrictions, or account freezes.
- **Account holds and payment disruptions:** PayPal may place security holds or reserve limits on accounts because of unusual transaction patterns, potentially delaying members' access to benefit payments.
- **Fees:** Payouts, cross-border payments, and currency conversions may result in transaction fees that exceed the cost of traditional direct deposit or a dedicated disbursement program.

- **Administration and recordkeeping limitations:** PayPal may not provide the enrollment controls, payment records, reconciliation tools, and support processes needed to administer recurring member benefit payments.

  After extensive research into alternative payment methods, Benefits Division's Process Management Group recommended electronic funds transfer (EFT) as the best secondary option to direct deposit rather than payment processors such as PayPal or Apple Pay. A prepaid Mastercard provides LACERA members with faster access to funds and the added convenience of using the card for purchases wherever Mastercard is accepted.

LACERA

October 21, 2026

TO: Each Member
Board of Retirement

FROM: Insurance, Benefits and Legislative Committee
Les Robbins, Chair
Aleen Langton, Vice Chair
Ernesto J. Pantoja
Shawn R. Kehoe
Jason Green, Alternate

FOR: November 4, 2026, Board of Retirement Meeting

SUBJECT: **Provide Voting Directions on SACRS 2027 Legislative Platform**

**RECOMMENDATION**
That the Board of Retirement—

1. Provide voting instructions to its voting delegate to vote YES or NO on sponsorship by the State Association of County Retirement Systems (SACRS) of its legislative proposals for the SACRS 2027 legislative platform; and
2. Provide feedback to staff on these legislative proposals, in particular the substantive proposals.

**BACKGROUND**
Each year, the 20 retirement systems operating under the County Employees Retirement Law of 1937 (CERL) are asked to submit proposals to the SACRS Legislative Committee for sponsorship in the annual SACRS legislative platform. The items submitted should have application to all CERL systems rather than an individual system; they should not propose new benefits that will be paid for by the plan sponsor; and they should not create major issues, such as conflicts with Proposition 162 or with any of the 19 other CERL retirement systems.

This year these proposals were not submitted by individual CERL systems but instead were developed by the SACRS Legislative Committee. They will be presented to the SACRS membership for approval at the Business Meeting of the SACRS Fall Conference on Friday, November 13, 2026. The memo presents the legislative proposals as either technical and conforming amendments and substantive amendments.

The Board of Retirement's (BOR) policy for SACRS business is that the Chief Executive Officer is the SACRS voting delegate with alternates being the BOR officers and the remaining trustees by board seat number.

## DISCUSSION: Technical and Conforming Amendments

### Issue: 1: Garnishments (Amend 31452)

*Current Law*

Member benefits are not subject to execution or any other *process of court* except to the extent permitted by law, such as child, family, and spousal support.

The Franchise Tax Board lists a number of public sector retirement systems that are not subject to its Orders to Withhold. However, CERL retirement systems are not included in its list.

*Proposed*

The Franchise Tax Board is an executive branch agency and not a court of law. The amendment would provide that member benefits are not subject to execution or *any process whatsoever* except to the extent provided under current law.

### Issue 2: Actuarial Valuations (Amend 31453)

*Current Law*

The retirement board currently *recommends* to the board of supervisors the changes in rates of interest and contributions of members.

*Proposed*

The amendment would clarify that the retirement board *transmits* rather than recommends that information from the actuarial valuation to the board of supervisors. This conforms the plenary authority of the retirement system under Proposition 162 to establish actuarial assumptions and contribution rates and provides for the board of supervisors to implement those contribution rates.

### Issue 3: "Actuarial Equivalent" Definition (Amend 31456)

*Current Law*

"Actuarial equivalence" is defined as being based on mortality tables adopted by the *board of supervisors*.

*Proposed*

The amendment would conform CERL to Proposition 162, which provides that the *retirement board* has sole and exclusive power to provide for actuarial services, such as the adoption of mortality tables.

### Issue 4: Board of Investments Cross-References (Amend 31459, 31459.1)

*Current Law*

To the extent that a CERL system has established a board of investments, the term "board" in CERL means a "board of investments" or means both a "board of retirement" and a "board of investments."

*Proposed*
The amendments will update the sections in CERL where the term "board" means a "board of investments" or both a "board of retirement" or "board of investments" as a result the amendments in this package of legislative proposals.

**Issue 7: Board Regulations (Amend 31525)**
*Current Law*
The board may make regulations that are not inconsistent with CERL. The regulations become effective when approved by the board of supervisors.

*Proposed*
Regulations are enacted by executive branch agencies to effectuate statutes passed by legislative bodies. In the past, LACERA was managed by the Treasurer-Tax Collector, who reported to the Board of Supervisors and sought its approval for LACERA's regulations.

The amendment would conform the board's plenary authority and fiduciary responsibility as provided under Proposition 162 for the investment of moneys and administration of the system and remove the requirement for board regulations to be approved by the board of supervisors.

**Issue 9: Interest Credits (Amend 31591)**
*Current Law*
This section references mortality tables as being adopted by the *board of supervisors*.

*Proposed*
The amendment would conform CERL to Proposition 162, which provides that the *retirement board* has sole and exclusive power to provide for actuarial services, such as the adoption of mortality tables.

**Issue 10: Actuarial Valuations (Amend 31611)**
*Current Law*
The retirement board currently *recommends* to the board of supervisors the changes in rates of interest and contributions of members.

*Proposed*
The amendment would clarify that the retirement board *transmits* rather than recommends that information from the actuarial valuation to the board of supervisors. This conforms the plenary authority of the retirement system under Proposition 162 to establish actuarial assumptions and contribution rates and provides for the board of supervisors to implement those contribution rates.

**Issue 11: "Actuarial Rate" Definition (Amend 31612)**

*Current Law*

This section references mortality tables as being adopted by the *board of supervisors*.

*Proposed*

The amendment would conform CERL to Proposition 162, which provides that the *retirement board* has sole and exclusive power to provide for actuarial services, such as the adoption of mortality tables.

**Issue 12: Interest (Amend 31615)**

*Current Law*

This section references mortality tables as being adopted by the *board of supervisors*.

*Proposed*

The amendment would conform CERL to Proposition 162, which provides that the *retirement board* has sole and exclusive power to provide for actuarial services, such as the adoption of mortality tables.

## DISCUSSION: Substantive Amendments

**Issue 5: Employer Reimbursement for Trustee Duties (Amend 31522)**

*Current Law*

The duties of elected board members who are employees of the county are included as part of their county employment, and their board duties shall normally take precedence over any other duties. The elected board members shall not receive any additional compensation as a result of their election to the board.

*Proposed*

The amendment would enable the governing entity (the county or district) that employs the member who was elected to the board to be reimbursed by the retirement fund for a percentage of the elected board member's schedule as an employee that is spent on board duties and activities. The retirement system would establish procedures for the reimbursement process, and the reimbursement shall not exceed 25% of the board member's work schedule as an employee.

Pro

- May mitigate concerns of trustee's county/district employer in terms of time spent on trustee and board duties by the employee.

Con

- Administratively onerous in tracking and reviewing the time that trustees spend on board duties and activities.
- May adversely affect board dynamics if in effect this provides for LACERA to "compensate" the salary of the trustee's regular employment.
- Provides the option to the board of supervisors rather than to the board of retirement or board of investments to invoke this section.

**Issue 6: Trustee Elections (Amend 31523, 31523.1)**

*Current Law*

In the event there is only one candidate duly nominated for a position on the board that requires an election, the *board of supervisors* shall order that no election be held and shall direct the registrar-recorder to cast a unanimous ballot in favor of the candidate.

*Proposed*

The amendment would provide that the *board of retirement (or board of investments)* shall order that no election be held and shall cast a unanimous ballot in favor of the candidate.

Pro

- Provides for the board of retirement or board of investments to efficiently formalize election of sole candidate if no election is to be held.

Con

- Creates a process that lacks uniformity and fragments the election process between retirement system and registrar.
- May encourage registrar to no longer conduct retirement system elections and shift process to retirement system.

**Issue 8: Annual Budget Limit (Amend 31580.2)**

*Current Law*

The retirement systems are subject to an annual budget limit that is the greater of twenty-one hundredths of 1 percent of the actuarial accrued liability of the retirement system or two million dollars, as adjusted annually for cost of living.

*Proposed*

The amendment would remove the percentage and dollar limit for the adoption of a budget.

Pro

- Avoids the need to periodically increase the budget limit or create exceptions to the limit due to individual 1937 Act systems approaching the limit.
- Avoid arbitrariness in the level of increases in the budget limit.

Con

- Reduces discipline to control costs against excessive organizational growth.
- Creates perception and accountability issues in the views of stakeholders in relation to budget growth.

**Issue 13: Reserve (Amend 31616)**

*Current Law*

After the crediting of interest to contributions and reserves, any earnings in excess of the credited interest are held in the Contingency Reserve Account as a reserve against deficiencies in interest earnings, losses on investments, payments of member benefits, or the amortization of gains or losses from the trading of bonds. The size of the reserve shall not exceed 3 percent of the total assets of the retirement fund.

*Proposed*

The amendment would provide that board of retirement (or board of investments) shall establish a reserve level it deems appropriate.

Pro

- Provides more flexibility to the board to determine the size of the reserve.

Con

- Removes a statutory guardrail and control.

**CONCLUSION**

The recommendation of this memo concerns the issue of whether SACRS should sponsor this package of legislative proposals for the 2027 legislative year. At this point, it is unknown how many different bills will be necessary for the introduction of these proposals. To the extent there is concern by the boards with any of these proposals, the board may direct a No vote on the entire pakcage of proposals or, alternatively, may direct a Yes vote recognizing that staff can make recommendations to the Board of Retirement or Board of Investments, as applicable, on these proposals for positions or amendments when they are introduced as bills in 2027, if SACRS approves sponsorship of these proposals. The latter approach has increased risk that a provision the Board find concerning may be introduced and become law.

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

1. Provide voting instructions to its voting delegate to vote YES or NO on sponsorship by the State Association of County Retirement Systems (SACRS) of its legislative proposals for the SACRS 2027 legislative platform; and
2. Provide feedback to staff on these legislative proposals, in particular the substantive proposals.

**Attachment**
SACRS Legislative Proposals 2027

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Cynthia Martinez
Naomi Padron, MKP Government Relations

August 25, 2026

RE: SACRS Legislative Proposals 2027

Dear SACRS Board of Directors,

The SACRS Legislative Committee has developed a legislative package for consideration in the upcoming 2027 legislative session. This proposal, called the CERL Modernization Act, reflects the input of SACRS member systems and is intended to provide administrative clarity and consistency for county retirement systems.

The CERL Modernization Act updates outdated provisions in the County Employees Retirement Law of 1937 to reflect modern governance practices, constitutional authority, and longstanding case law. Many of the proposed updates address statutory language that predates Proposition 162 (1992), which granted retirement boards plenary authority over the administration and investment of retirement system assets under Article XVI, Section 17 of the California Constitution. As a consortium of 20 independent county retirement systems, the 1937 Act systems have historically lacked the large legislative staffing resources available to statewide systems such as CalPERS and CalSTRS. As a result, portions of CERL still contain outdated references that no longer align with current constitutional governance standards or operational practice.

The proposed legislation clarifies the retirement boards' authority over administrative and procedural matters, consistent with the recent California Supreme Court ruling *LACERA v LA County*. It does not address retirement system staffing or personnel matters.

**Clarifies Governance Roles**

- Clarifies the respective roles of Boards of Retirement and Boards of Supervisors.
- Aligns CERL governance authority with constitutional standards established by Proposition 162.
- Aligns Board of Retirement authority more closely with governance standards applicable to CalPERS and CalSTRS.

**Modernizes Administrative Authority**

- Removes outdated statutory provisions requiring Board of Supervisors approval over actuarial and administrative functions now constitutionally vested in Boards of Retirement.

- Clarifies Board of Retirement authority over actuarial assumptions, contribution rates, administrative regulations, and reserve policies.
- Modernizes election administration and technical statutory provisions.

**Promotes Administrative Efficiency**

- Streamlines outdated procedural requirements.
- Eliminates obsolete administrative restrictions inconsistent with modern retirement system operations.
- Supports efficient, transparent, and accountable retirement system governance.

**Preserves County Authority**

- Does not change the authority of Boards of Supervisors to adopt retirement benefit formulas and other benefit provisions.
- Does not alter employer contribution obligations or collective bargaining responsibilities.
- Maintains existing county appointment authority for retirement board trustees.
- Does not alter retirement system staffing or personnel matters.

We thank the Legislative Committee for reviewing these proposals and engaging in a collaborative, deliberative process to achieve consensus on issues. These amendments represent governance and process improvements that will provide administrative efficiencies to retirement systems and members.

A summary table and proposed bill language is attached. Please note that draft language is subject to change during the legislative process.

Respectfully,

/s/

Eric Stern
Chair, SACRS Legislative Committee, and
Chief Executive Officer, Sacramento County Employees' Retirement System

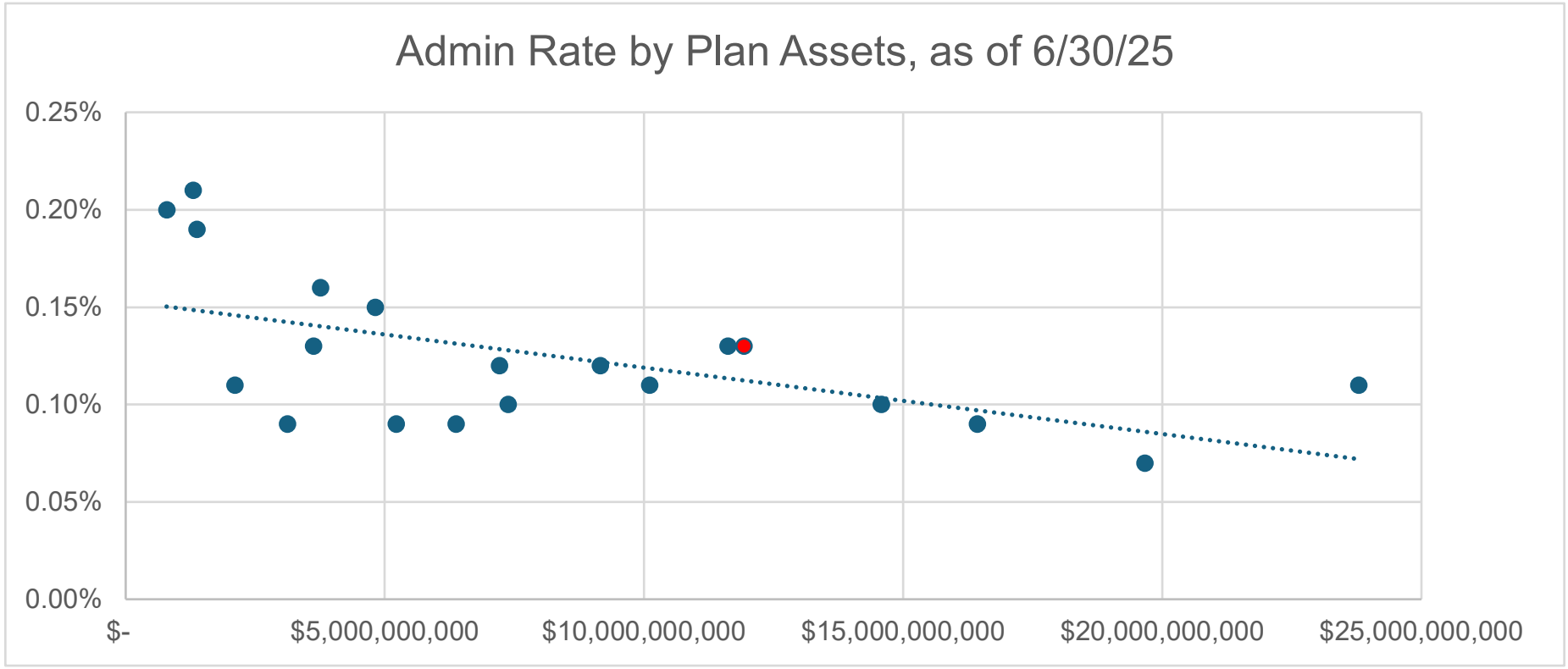
**ATTACHMENTS**

- SACRS 2027 Legislative Proposal – Summary Table
- Chart: Administrative Rate by System Assets
- SACRS 2027 Legislative Proposal – Draft Language

| Issue | Gov Code | Topic | Issue/Justification |
|---|---|---|---|
| 1 | 31452 | Garnishments | This amendment corrects an irregularity in state law to clarify that a member's pension is not subject to an Order to Withhold (OTW) from the California Franchise Tax Board, consistent with other retirement systems. Under current law, the following retirement systems are generally restricted from garnishing pension payments by "any other process whatsoever," which include FTB orders:<br>•US Government (5 USC 8346)<br>•CalPERS (GC 21255)<br>•CalSTRS (EDC 22005)<br>•Legislators' Retirement Fund (GC 9359.3)<br>•Municipal Utility District Retirement Systems<br>•Transit District Retirement Systems<br>However, for CERL systems, the Government Code restrictions on garnishments are tied to "any other process of court," which has created confusion over FTB orders because "process of court" refers to orders from the judicial branch of government. The FTB is an executive branch agency and thus not be covered under "process of court. However, it is the common practice of CERL systems to not recognize FTB orders to garnish pension payments. |
| 2 | 31453 | Actuarial valuation | This amendment clarifies that the Board of Retirement need only communicate actuarial information to the Board of Supervisors, updating outdated references that the Board of Supervisors must approve actuarial assumptions. The plenary authority to establish actuarial assumptions and contribution rates rests with the Board of Retirement, under Proposition 162. However, it is still necessary to provide this information to the Board of Supervisors (and plan sponsors) for budgeting purposes and transparency. |
| 3 | 31456 | "Actuarial Equivalent" defined | This amendment updates outdated phrasing from 1947 that refers to the adoption of mortality tables by the Board of Supervisors. The Board of Retirement has plenary authority under Article XVI of the California Constitution to adopt actuarial assumptions. |
| 4 | 31459<br>31459.1 | Board of Investments cross references | This amendment updates cross references to the LACERA Board of Investments |

| | | | |
|---|---|---|---|
| 5 | 31522 | Employer Reimbursement for Trustees | This amendment provides a mechanism for the retirement system, upon adoption by the Board of Supervisors, to reimburse an employing agency of an elected Board of Retirement trustee when the trustee is fulfilling Board duties while on leave from work. This provision creates a pathway to encourage employer support for elected Board Members to attend training sessions to fulfill statutory education requirements. This language is similar to section 20092 for CalPERS elected members, adopted in 1985. |
| 6 | 31523<br>31523.1 | Trustee Elections | This amendment directs the Board of Retirement, and not the Board of Supervisors, to declare an unopposed board of retirement candidate the winner of the election. More and more CERL systems are not using the Registrar of Voters to conduct elections and are self-administering their board elections. |
| 7 | 31525 | Regulations; approval | This amendment deletes the requirement that Board of Retirement regulations must be approved by the Board of Supervisors. This language is a holdover from when CERL systems were managed as an internal county department, and was adopted prior to the passage of Prop. 162 in 1992, which provided plenary authority to the Board of Retirement. Many county retirement systems have already evolved its practices to adopt "policies" instead of "regulations," which is a distinction in name only. It is not inappropriate for the Board of Supervisors to make decisions on practical and procedural administrative retirement matters, when the Board of Retirement is a bona fide administrative rule-making body. The Board of Supervisors still maintains appointment authority for four Board of Retirement trustees and maintains authority to adopt or discontinue numerous benefit options in the CERL. |

| | | | |
|---|---|---|---|
| 8 | 31580.2 | Annual budget; expenses of administration | This amendment removes an outdated and unforceable provision that established an administrative cap on county retirement system expenses. The Board of Retirement has plenary authority under Article XVI of the California Constitution and is charged under this section to adopt its own budget using trust fund earnings. The purpose in enacting 31580.2 was to transfer costs of operating the retirement system from the county's General Fund to investment earnings, placing fiscal responsibility in the Retirement Board. Removing the administrative cap provides conformity with CalPERS statutes; the Legislature repealed a similar administrative cap for CalPERS under section 20202.5 (renumbered to 20173) in 1975. The CERL provision has been amended over the years to exclude investment, technology, and legal costs (as well as moving to a threshold based on total liabilities instead of assets) which has made the cap more arbitrary. The Board of Retirement has the appropriate budgetary control to ensure fiscal restraint, and almost all CERL systems adopt administration budgets far below the cap, the exceptions being the smallest systems that lack of economies of scale. |
| 9 | 31591 | Interest credits | This amendment updates outdated phrasing from 1947 that refers to the adoption of mortality tables by the Board of Supervisors. The Board of Retirement has plenary authority under Article XVI of the California Constitution to adopt actuarial assumptions. |
| 10 | 31611 | Actuarial valuation | This amendment removes references regarding Board of Supervisor approval of contribution rates and actuarial assumptions. This is an outdated practice that conflicts with the Board of Retirement authority under Article XVI, Section 17, of the California Constitution. This language should have been updated after voters approved Prop 162 in 1992. |
| 11 | 31612 | "Actuarial rate" defined | This amendment updates phrasing to indicate that interest rate assumptions fall under the jurisdiction of and are adopted by the Board of Retirement, not the Board of Supervisors. |
| 12 | 31615 | Interest | This amendment updates phrasing to indicate that mortality tables fall under the jurisdiction of and are adopted by the Board of Retirement, not the Board of Supervisors. |
| 13 | 31616 | Reserve Policy | This amendment removes the 3% cap on reserves and authorizes the Board of Retirement to establish a reserve level it deems appropriate. |


Admin Rate by Plan Assets, as of 6/30/25
0.25%
0.20%
0.15%
0.10%
0.05%
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$5,000,000,000
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1. *31452 – Garnishments*

   *Section 31452 of the Government Code is amended to read:*

The right of a person to a pension, annuity, retirement allowance, return of contributions, the pension, annuity, or retirement allowance, any optional benefit, any other right accrued or accruing to any person under this chapter, the money in the fund created or continued under this chapter or the California Public Employees' Pension Reform Act of 2013, and any property purchased for investment purposes pursuant to this chapter, are exempt from taxation, including any inheritance tax, whether state, county, municipal, or district. They are not subject to execution or any ~~other process of court~~ **process** whatsoever except to the extent permitted by Section 31603 of this code and Section 704.110 of the Code of Civil Procedure, and are unassignable except as specifically provided in this chapter.

2. *31453 – Actuarial Valuation reporting*

   *Section 31453 of the Government Code is amended to read:*

(a) An actuarial valuation shall be made within one year after the date on which any system established under this chapter becomes effective, and thereafter at intervals not to exceed three years. The valuation shall be conducted under the supervision of an actuary and shall cover the mortality, service, and compensation experience of the members and beneficiaries, and shall evaluate the assets and liabilities of the retirement fund. Upon the basis of the investigation, valuation, and recommendation of the actuary, the board shall, at least 45 days prior to the beginning of the succeeding fiscal year, ~~recommend~~**transmit** to the board of supervisors the changes in the rates of interest, in the rates of contributions of members, and in county and district appropriations as are necessary. With respect to the rates of interest to be credited to members and to the county or district, the board may, in its sound discretion, ~~recommend~~**provide** a rate that is higher or lower than the interest assumption rate established by the actuarial survey. No adjustment shall be included in the new rates for time prior to the effective date of the revision.

(b) (1) Upon the basis of the investigation, valuation, and recommendation of the actuary, the board shall, at least 45 days prior to the beginning of the succeeding fiscal year, ~~recommend~~**transmit** to the governing body of a district within the county system that is not governed by the board of supervisors the changes in the rates of contributions of district members and in district appropriations as are necessary.

(2) This subdivision shall not be operative in any county until the board of supervisors, by resolution adopted by majority vote, makes the provision applicable in that county.

*3. 31456 – "Actuarial Equivalent" defined*

Section 31456 of the Government Code is amended to read:

"Actuarial equivalent" means a benefit of equal value when computed upon the basis of the mortality tables adopted by the board ~~of supervisors~~ and regular interest thereon.

*4. 31459, 31459.1 – Board of Investments cross-references*

*Section 31459 of the Government Code is amended to read:*

(a) In a county in which a board of investments has been established pursuant to Section 31520.2:

(1) As used in Sections 31453, 31453.5, 31454, 31454.1, 31454.5, **31456**, 31472, 31588.1, 31589.1, 31591, 31592.3, 31594, 31595.1, 31595.9, 31596, 31596.1, 31601.1, 31607, 31611, **31612, 31615,** 31616, 31625, 31784, and 31872, "board" means a board of investments.

(2) As used in the first paragraph of Section 31592.2, "board" means a board of investments.

(3) Sections 31510.4, 31522, 31523, 31524, 31525, 31528, 31529, 31529.5, 31595, 31618, 31680, and 31680.1 apply to both the board of retirement and board of investments, and "board" means both "board of retirement" and "board of investments."

(b) In Article 17 (commencing with Section 31880), "board" means the Board of Administration of the Public Employees' Retirement System.

(c) In all other cases, "board" means the board of retirement.

*Section 31459.1 is amended to read:*

(a) In a county in which a board of investments has been established pursuant to Section 31520.2:

(1) As used in Sections 31453, 31453.5, 31454, 31454.1, 31454.5, **31456,** 31472, 31588.1, 31589.1, 31591, 31592.3, 31594, 31595.1, 31595.9, 31596, 31596.1, 31601.1, 31607, 31610, 31611, 31612, 31613, **31615,** 31616, 31618, 31621.11, 31625, 31639.26, 31784, and 31872, "board" means board of investments.

(2) As used in the first paragraph of Section 31592.2 and the first paragraph and subdivision (c) of the second paragraph of Section 31595, “board” means a board of investments.

(3) Sections 31521, 31522, 31522.1, 31522.2, 31523, 31524, 31525, 31528, 31529, 31529.5, 31535.1, 31580.2, 31614, 31680, and 31680.1, apply to both the board of retirement and board of investments, and “board” means either or both the board of retirement and board of investments.

(4) Subdivision (a) of Section 31526 and subdivisions (a) and (b) of the second paragraph of Section 31595 apply to both the board of retirement and board of investments, and “board” means either or both the board of retirement and board of investments.

(b) In Article 17 (commencing with Section 31880) of this chapter, “board” means the Board of Administration of the Public Employees’ Retirement System.

(c) In all other cases, “board” means the board of retirement.

(d) This section shall apply only in a county of the first class, as defined in Section 28020, as amended by Chapter 1204 of the Statutes of 1971, and Section 28022, as amended by Chapter 43 of the Statutes of 1961.

*5. 31522 – Duties of board members; additional compensation*

*Section 31522 is amended to read:*

**(1)** The official duties of elected board members who are employees of the county or a district shall be included as part of their county or district employment and their board duties shall normally take precedence over any other duties, **except as provided in (2)**. The elected board members who are county or district employees shall not receive any additional compensation by virtue of their election to the board.

**(2) Upon approval of the governing entity, each county or district that employs an elected member of the board shall be reimbursed by the retirement fund in an amount equal to the salary and benefits paid to the elected board member by the county or district for the percentage of the elected board member’s regular work schedule during which the elected board member is on leave from the county or district to attend meetings or activities of the board, or meetings of committees or subcommittees of the board, or to otherwise fulfill his or her responsibilities to the system. The system shall establish procedures for the reimbursement process, and the reimbursement shall not exceed 25% of the board member’s regular work schedule.**

6. 31523, 31523.1 – Retirement Board Elections

Section 31523 of the Government Code is amended to read:

(a) In the event of a vacancy in the second, third, seventh, eighth, or alternate seventh member position on the board of retirement, the board shall cause an election to fill the vacancy to be held at the earliest possible date, except as provided in Sections 31520.3 and 31520.5. The vacancy in the second, third, or eighth member position on the board of retirement shall be filled for the duration of the current term except that, if the remaining portion of the current term is six months or less on the date of the election, a single election may be held to fill the vacancy for the remainder of the current term and to fill the position for the succeeding term. With respect to a vacancy in the seventh member position, candidates shall be a safety member from a group which is not represented by an incumbent alternate seventh member. With respect to the alternate seventh member position, the candidates shall be limited to the group under Section 31470.2 or 31470.4, or any other eligible safety member in a county if there is no eligible candidate from the groups under Sections 31470.2 and 31470.4 that is not represented by an incumbent seventh board member. The successful candidate shall serve for the duration of the current term.

(b) If there is a vacancy with respect to the alternate retired member, the board of retirement shall, by majority vote, appoint a replacement alternate member in the same manner as prescribed in Sections 31520.3 and 31520.5 for the initial appointment of an alternate retired member, who shall serve until the expiration of the current term of the current eighth member.

(c) If an election has been called on the expiration of the term of office of any member or alternate member, or to fill a vacancy for the second, third, seventh, eighth, or alternate seventh member of a board of retirement, and only one candidate has been duly nominated in accordance with the rules established for the holding of that election, the board~~supervisors~~ shall order that no election be held and shall ~~direct the clerk to~~ cast a unanimous ballot in favor of the candidate.

*Section 31523.1 of the Government Code is amended to read:*

(a) In the event of a vacancy in the second, third, fourth, or eighth member position on a board of investments established pursuant to Section 31520.2, the board of investments shall cause an election to be held at the earliest possible date to fill the vacancy. The vacancy in the second, third, fourth, or eighth member position shall be filled for the duration of the current term except that, if the remaining portion of the current term on the date of the election is six months or less, a single election may be held to fill the vacancy for the remainder of the current term and to fill the position for the succeeding term.

(b) If an election has been called on the expiration of the term of office of any member, or to fill a vacancy for the second, third, fourth, or eighth member position of a board of investments, and only one candidate has been duly nominated in accordance with the rules established for the holding of that election, the board**t**~~supervisors~~ shall order that no election be held and shall ~~direct the clerk to~~ cast a unanimous ballot in favor of the candidate.

*7. 31525 – Regulations; approval*

*Section 31525 of the Government Code is amended to read:*

The board may make regulations not inconsistent with this chapter**, the Public Employees' Pension Reform Act of 2013, and any other provisions of law applicable to county retirement systems.** ~~The regulations become effective when approved by the board of supervisors.~~

*8. 31580.2 – Annual Budget Limit*

*Section 31580.2 of the Government Code is amended to read:*

~~(a)~~ In counties in which the board of retirement, or the board of retirement and the board of investment, have appointed personnel pursuant to Section 31522.1, 31522.5, 31522.7, 31522.9, 31522.10, or 31522.11, the respective board or boards shall annually adopt a budget covering the entire expense of administration of the retirement system, which expense shall be charged against the earnings of the retirement fund. ~~The expense incurred in any year may not exceed the greater of either of the following:~~

~~(1) Twenty-one hundredths of 1 percent of the accrued actuarial liability of the retirement system.~~

~~(2) Two million dollars ($2,000,000), as adjusted annually by the amount of the annual cost-of-living adjustment computed in accordance with Article 16.5 (commencing with Section 31870).~~

~~(b) Expenditures for computer software, computer hardware, and computer technology consulting services in support of these computer products shall not be considered a cost of administration of the retirement system for purposes of this section.~~

*9. 31591 – Interest Credits*

*Section 31591 of the Government Code is amended to read:*

(a) Regular interest shall be credited semiannually on June 30th and December 31st to all contributions in the retirement fund which have been on deposit for six months

immediately prior to that date. Interest at the rate of 21/2 percent per annum, until otherwise determined by the board, compounded semiannually, shall be used in the calculation of benefits under any mortality table adopted by the board ~~of supervisors~~.
(b) No interest shall be credited to a member's account after the membership of the member in the retirement association has ceased, except under any of the following circumstances:

(1) The former member has left his or her accumulated contributions in the retirement fund and has either elected, in writing, a deferred retirement allowance, or is eligible to so elect under Section 31700 but has failed to do so.

(2) The surviving spouse of a deceased member or the legally appointed guardian of the member's unmarried children under age 18 has elected to leave a death benefit on deposit as provided for in Section 31781.2.

(3) The former member, regardless of service, has left his or her accumulated contributions in the retirement fund and has not terminated employment.

*10. 31611 – Actuarial Valuation*

*Section 31611 is amended to read:*

An actuarial valuation shall be made within one year after the date on which any system established under this chapter becomes effective, and thereafter at intervals not to exceed three years. The valuation shall be conducted under the supervision of an enrolled actuary and shall cover the mortality, service, and compensation experience of the members and beneficiaries, and shall evaluate the assets and liabilities of the retirement fund. Upon the basis of the investigation, valuation, and recommendation of the actuary, the board shall, at least 60 days prior to the beginning of the succeeding fiscal year, **transmit**~~recommend to~~ the board of supervisors **of** such changes in the rates of interest, in the rates of contributions of members, in county and district appropriations as are necessary, and appropriate mortality tables. ~~In making recommendations to the board of supervisors, the board shall act with the care, skill, prudence and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with such matters would use in the conduct of an enterprise of a like character and with like aims.~~ No adjustment shall be included in the new rates for time prior to the effective date of the revision. The cost of actuarial valuations and investigations may, in the sound discretion of the board, be charged against the earnings of the retirement fund.

*11. 31612 – "Actuarial rate" defined*

*Section 31612 is amended to read:*

"Actuarial rate" means the interest assumption rate established by the most recent actuarial survey **adopted**~~recommended~~ by the board ~~of retirement and adopted by the board of supervisors~~.

*12. 31615: Interest*

Section 31615 is amended to read:

Regular interest at the actuarial rate, or at the highest rate possible if net earnings, as defined in Section 31613 are not sufficient to credit the full actuarial rate, shall be credited semiannually on June 30 and December 31 to all contributions, reserves, and accounts in the retirement fund, except the Contingency Reserve Account, which have been on deposit for six months immediately prior to those dates.

Interest at the actuarial rate, compounded semiannually, shall be used in the calculation of benefits under any mortality table adopted by the board ~~of supervisors~~. No interest shall be credited to a member's account after the termination of the member's county service, unless the member has elected, in writing, to leave his or her accumulated contributions in the retirement fund and be granted a deferred retirement allowance, or the surviving spouse of a deceased member or the legally appointed guardian of the member's unmarried children under age 18 has elected to leave a death benefit on deposit as provided for in Section 31781.2.

*13. 31616: Reserves*

Section 31616 is amended to read:

After the semiannual application of Section 31615, earnings of the retirement fund in excess of the total interest credited to contributions and reserves shall remain in the fund as a reserve against deficiencies in interest earnings, losses on investments, or payments made pursuant to Section 31588.1 or 31589.1, if applicable.

These funds shall be placed in an account known hereafter as the Contingency Reserve Account. The size of this account shall be determined semiannually by the board ~~but shall not exceed 3 percent of the total assets of the retirement fund~~.

If, at the end of any semiannual period, the balance of the Contingency Reserve Account falls below 1 percent of system assets, the board shall, by the end of the subsequent semiannual period, provide funds from earnings of fund assets from the subsequent semiannual period, to bring the level of the Contingency Reserve Account to at least 1 percent of system assets.
No funds in the Contingency Reserve Account shall be available for the payment of benefits.

Net earnings remaining after the application of this section shall be applied as provided in Sections 31617, 31618, and 31619.

LACERA

**FOR INFORMATION ONLY**

October 13, 2026

TO: Trustees – Board of Retirement

FROM: Jean J. Kim
Senior Staff Counsel

DATE: Board of Retirement Meeting of November 4, 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:

Critical Shortage Range Bonus (Item No. 209)

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 remains 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<u>Critical Shortage Range Bonus (Item No. 209)</u>
The Critical Shortage Range Bonus (Item No. 209) was created to address recruitment difficulties by providing a bonus in an amount equal to at least one level but not more than four above the regular salary schedule established for any particular class.

The original pensionability determination for this item was as follows:

(1) Determined to qualify as compensation earnable for legacy members because it is available to all similarly situated members in the same grade or class and it is paid 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” in accordance with Cal. Govt. Code §31461(a). It is also not excluded from compensation earnable under Cal. Govt. Code §31461(b)(1)(B) because even though it is an ad hoc payment as it is paid only as long as there is determined to be a critical shortage for certain positions, it is paid to everyone in the same classification.

(2) Determined to not qualify as pensionable compensation for PEPRA members because it is an ad hoc payment as it is paid only as long as there is determined to be a critical shortage for certain positions, and therefore, it is excluded under Cal. Govt. Code §7522.34(c)(3).

This pay item is now being revised to extend eligibility to certain specified classifications within Bargaining Units 611 and 612. Since the only change has been to extend eligibility to additional classifications, 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.

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
Attachments

# 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** | | | |
| **209** | **CRITICAL SHORTAGE RANGE** | The Critical Shortage Range (CSR) bonus is being **revised to extend eligibility to various classes of sworn peace officers** to address recruitment and retention issues.<br><br>On September 24, 2026, the Chief Executive Office (CEO) authorized a 3% CSR bonus effective July 1, 2026, and an additional 1% percent CSR bonus effective July 1, 2028, for the following classifications in Bargaining Units 611 and 612.<br><br>• Deputy Sheriff Trainee (Item No. 2707)<br>• Deputy Sheriff (Item No. 2708)<br>• Sergeant (Item No. 2717)<br>• Lieutenant (Item No. 2719) | 11/8/2012 |

**Original Analysis of Pay Code 209 (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 |
|---|---|---|---|---|
| 209 | **MANPOWER SHORTAGE RANGE** | This bonus provides a special hiring range which is at least one level, but not more than four schedules above the regular salary schedule established for a class. Upon the recommendation of the CAO **because of recruitment difficulties,** the Board approves the range and authorizes the appointment of persons to positions for which the range is to apply. | (c)(3) | This salary-range extension bonus as defined by **County Code Sect. 6.20.060** "*provides a special hiring range . . .* ***because of recruitment difficulties.*** " In addition, "*the CAO . . .* ***may discontinue the authority*** *to appoint persons to a manpower shortage range if he finds that* ***a critical manpower shortage no longer exists*** ." (**Reference: Sect. 6.20.060.G).** As such, it would meet the definition of **subdivision (c)(3)** based on being "*any one-time or ad hoc payments made to a member*" since it would be dependent upon events such as a **temporary manpower shortage**. In addition, it would meet the definition of **subdivision (c)(11)** since it is a "*form of compensation . . . inconsistent with the requirements of subdivision (a)*" (i.e. **NOT** "*paid to* ***similarly situated members*** ***of*** *the same group of class of employment*"). Thus, it would be classified as **EXCLUDE from pensionable income** for new members as of 1/1/2013. |

**FOR INFORMATION ONLY**

October 13, 2026

**TO:** Each Trustee
Board of Retirement

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

Elsy Gutierrez
Supervising Administrative Assistant II

**FOR:** November 4, 2026, Board of Retirement Meeting

**SUBJECT:** **Contract Activity Report – September 2026**

The Board of Retirement (BOR) adopted the Policy for the Procurement of Goods and Services (PGS) on September 4, 2024, and revised it on February 4, 2026. The PGS requires the Vendor Management Group to provide the BOR with a monthly report on all contracting activity. Below is a summary of contracting activity for September 2026.

| Category | Total | Total Contract Value |
|---|---|---|
| New Contracts | 4 | $235,076.00 |
| Renewals | 4 | $85,179.00 |
| Amendments | 4 | $5,536.00 |
| Extensions | 0 | $0.00 |
| **Total** | **12** | **$325,791.00** |

Attachment
EG: eg
C: Luis Lugo, Chief Executive Officer
Jessica Baxter, Chief Administrative Officer
JJ Popowich, Chief Benefits Officer
Jude Perez, Chief Investments Officer
Steven P. Rice, Chief Counsel
Ricki Contreras, Division Manager, Administrative Services
Carly Ntoya, Director of Human Resources
Kathy Delino, Chief Information Technology

**Summary of Contracting Activity: September 2026**

| Vendor | Division | Type | Term (Months) | New/Renewals | Total Contract Value |
|---|---|---|---|---|---|
| Canva US, Inc. | Human Resources | Software License Agreement | 12 | N | $576.00 |
| Trident Shield, LLC | Human Resources | Employee Training and Education Services Agreement | 12 | N | $60,000.00 |
| Evergreen Solutions, LLC | Human Resources | Professional Services | 12 | N | $144,500.00 |
| Codesp | Human Resources | Software License Agreement | 12 | R | $4,475.00 |
| Snowflake Inc.** | Investments | Software License Agreement | 12 | N | $30,000.00 |
| Thompson Publishing Group, Inc.* | Legal | Software License Agreement | 12 | R | $65,580.00 |
| Freedom Solutions Group DBA Litera | Legal | Software License Agreement | 12 | R | $5,554.00 |
| Trident Services, Inc. | Systems | Software License Agreement | 12 | R | $9,570.00 |
| **Total** | | | | | **$320,255.00** |

| Vendor | Division | Type | Term (Months) | Amendment/Extension | Total Contract Value |
|---|---|---|---|---|---|
| Charter Communications Operating, LLC | Systems | Maintenance Service Agreement | 1 | A | $500.00 |
| Softchoice Corporation | Systems | Software License Agreement | 20 | A | $3,484.00 |
| Softchoice Corporation | Systems | Software License Agreement | 22 | A | $692.00 |
| Softchoice Corporation | Systems | Software License Agreement | 12 | A | $860.00 |
| **Total** | | | | | **$5,536.00** |

Legend
* Non-Competitive Procurements
** Contract Executed by Business Owner

LACERA

**FOR INFORMATION ONLY**

October 19, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager
Disability Retirement Services

FOR: November 4, 2026, Board of Retirement Meeting

SUBJECT: **1st Quarter Paid Invoice Summary & Threshold Report – July 1, 2026, to September 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 September 30, 2026, there was no vendor/case that met the reporting criteria.

REVIEWED AND APPROVED:

JJ Popowich, Chief Benefits Officer

**1st Quarter Paid Invoices — Summary by Service Category**

| GL Account | Service Category | Amount Paid |
|---|---|---|
| 9673 | Photocopies of Documents | $34,725.46 |
| 9772 | Outside Legal Counsel | $11,632.70 |
| 9802 | Hearing Officer Fees | $23,580.00 |
| 9803 | Medical Fees | $700,655.01 |
| 9804 | Steno Services | $950.00 |
| 9805 | Investigative Services | $3,905.00 |
| **Total Paid Invoices** | | **$775,448.17** |

**Quarterly Threshold Report - Threshold:** $30,000 per vendor/case

The cumulative total shown below reflects all paid invoices for the reportable vendor/case combination through September 30, 2026. No vendor/case combination met the $30,000 reporting threshold during this reporting period.

**Report Summary**

| REPORTABLE ITEMS | THRESHOLD | CUMULATIVE TOTAL |
|---|---|---|
| 0 | $30,000 | 0 |

**Legend**

- **“New”** indicates that the vendor/case first exceeded the $30,000 reporting threshold during this reporting period.
- **"Initial Report"** indicates the first time a vendor/case combination is being reported under the quarterly threshold reporting process.
- Additional payments for the same vendor/case will be reported in future quarterly reports as subsequent activity.
- Previously reported vendor/case combinations will not be repeated unless additional payment activity occurs during the reporting period.

LACERA

**FOR INFORMATION ONLY**

October 21, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Barry W. Lew
Legislative Affairs Officer

FOR: November 4, 2026 Board of Retirement Meeting
November 10, 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.

**Reviewed and Approved:**

Cynthia Martinez

**Cynthia Martinez**
**Chief, Communications**

**Attachments**
LACERA Legislative Report Index
LACERA Legislative Report

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Jon Grabel
Scott Zdrazil
Scott Zdrazil
Tony Roda, Williams & Jensen
Naomi Padron, MKP Government Relations

LACERA Legislative Report
2025-26 Legislative Session
Status as of September 23, 2026

| CATEGORY | BILL | AUTHOR | TITLE | BOR POSITION | INDEX NUMBER |
|---|---|---|---|---|---|
| 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 | | 18 |
| BROWN_ACT | SB 1187 | Maria Elena Durazo (D) | Open Meetings | | 19 |
| 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 | | 20 |
| 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 | | 21 |
| PUBLIC_RETIREMENT | AB 1054 | Mike A. Gipson (D) | Public Employee Health Benefits | | 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 | | 17 |
| SOCIAL_SECURITY | HR 1700 | Valerie Hoyle (D) | Social Security Benefits | | 23 |
| SOCIAL_SECURITY | HR 904 | Jeff Van Drew (R) | Gross Income SS Benefit Inclusion Repeal | | 22 |
| SOCIAL_SECURITY | S 1504 | Bill Cassidy (R) | Social Security Administration | | 25 |
| SOCIAL_SECURITY | S 1505 | Bill Cassidy (R) | Social Security Beneficiaries | | 26 |
| SOCIAL_SECURITY | S 770 | Bernard Sanders (I) | Social Security Benefits | | 24 |

1.

# California Assembly Bill 259 (2025-2026)

CA A 259 | Blanca E. Rubio (D-048) | Failed - Adjourned | 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)

CA A 340 | Patrick Ahrens (D-026) | Failed - Adjourned | 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.
**)25:** From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
**. ..., _025:** 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)

CA A 409 | Joaquin Arambula (D-031) | Failed - Adjourned | 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

+ Sh

4.

# California Assembly Bill 467 (2025-2026)

CA A 467 | Mike Fong (D-049) | Failed - Adjourned | 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

AI-generated content should be reviewed for accuracy. Submit feedback

**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:**

| | |
|---|---|
| **Aug 13, 2026:** | In SENATE Committee on APPROPRIATIONS: Held in committee. |
| **Aug 3, 2026:** | In SENATE Committee on APPROPRIATIONS: To Suspense File. |
| **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. |
| **026:** | 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

**Topics:** Local School Districts and Boards | Junior, Community Colleges | Postsecondary Education Finance

+ Show more

5.

# California Assembly Bill 1054 (2025-2026)

CA A 1054 | Mike A. Gipson (D-065) | Vetoed | Fiscal Committee (Yes) | Urgency Clause (No) | Vetoed

## Public Employee Health Benefits

AI-generated

This bill establishes a voluntary Deferred Retirement Option Program (DROP) within the Public Employees' Retirement System (PERS) for eligible patrol members of State Bargaining Unit 5 (Highway Patrol) and state peace officer/firefighter members of State Bargaining Unit 8 (Firefighters), as well as certain supervisory or managerial employees of the Department of the California Highway Patrol and the Department of Forestry and Fire Protection. Under the program, eligible members may elect to continue employment while deferring retirement, accruing benefits into a program account payable as a lump sum upon eventual retirement. The bill also modifies the definition of annuitant under the Public Employees' Medical and Hospital Care Act to permit DROP participants to enroll in health benefit plans.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

**An act to amend Section 22760 of, and 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:**

| | |
|---|---|
| **Sep 27, 2026:** | Vetoed by GOVERNOR. |
| **Sep 4, 2026:** | *****To GOVERNOR. |
| **Aug 31, 2026:** | Enrolled. |
| **Aug 26, 2026:** | In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment. |
| **Aug 26, 2026:** | In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence. |
| **Aug 17, 2026:** | In SENATE. Read second time. To third reading. |
| **Aug 13, 2026:** | In SENATE. Read second time and amended. To second reading. |
| **Aug 13, 2026:** | From SENATE Committee on APPROPRIATIONS: Do pass as amended. |
| **Aug 3, 2026:** | In SENATE Committee on APPROPRIATIONS: To Suspense File. |
| **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

**Topics:** Hospitals | Collective Bargaining and Unions [Public Sector] | Healthcare Benefits [Public Sector] + Show more

6.

## California Assembly Bill 1383 (2025-2026)

CA A 1383 | Tina McKinnor (D-061) and 22 Co-sponsors | Vetoed | Fiscal Committee (Yes) | Urgency Clause (No) | Vetoed

### Public Employees Retirement Benefits

AI-generated

This bill amends California Government Code provisions governing public employees' retirement benefits under the California Public Employees' Pension Reform Act of 2013. It establishes new defined benefit retirement formulas for safety members effective January 1, 2027, and modifies the pensionable compensation limits applicable to new members of public retirement systems. The bill also authorizes public employers and recognized employee organizations to collectively bargain over adjustments to safety member retirement benefit formulas.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**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:**

| | |
|---|---|
| **Sep 20, 2026:** | Vetoed by GOVERNOR. |
| **Sep 9, 2026:** | *****To GOVERNOR. |
| **Sep 3, 2026:** | Enrolled. |
| **Aug 30, 2026:** | In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment. |
| **Aug 30, 2026:** | In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence. |
| **Aug 28, 2026:** | In SENATE. Read second time. To third reading. |
| **Aug 27, 2026:** | In SENATE. Read third time and amended. To second reading. |
| **Aug 13, 2026:** | In SENATE. Read second time. To third reading. |
| **Aug 13, 2026:** | From SENATE Committee on APPROPRIATIONS: Do pass. |
| **026:** | In SENATE Committee on APPROPRIATIONS: To Suspense File. |
| **026:** | 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

**Topics:** Teacher/School Employee Retirement Systems | Public Employee Retirement Systems | Public Employee Benefits- Other

+ Show more

7.

# California Assembly Bill 1439 (2025-2026)

CA A 1439 | Robert Garcia (D-050) and 2 Co-sponsors | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## Public Retirement Systems: Labor standards

AI-generated

This bill adds a new section to the Government Code requesting the University of California, Berkeley, Labor Center to conduct an independent study analyzing the extent of 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 study is also requested to examine the impact of labor standards protections, or lack thereof, on California workers, the state's economy, development costs, and project completion timelines.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

[Approved by Governor September 20, 2026. Filed with Secretary of State September 20, 2026.]

**Status:**

| | |
|---|---|
| **Sep 20, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-365 |
| **Sep 20, 2026:** | Signed by GOVERNOR. |
| **Sep 4, 2026:** | *****To GOVERNOR. |
| **Sep 1, 2026:** | Enrolled. |
| **Aug 27, 2026:** | In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment. |
| **Aug 26, 2026:** | In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence. |
| **Aug 17, 2026:** | In SENATE. Read second time. To third reading. |
| **:026:** | In SENATE. Read second time and amended. To second reading. |
| **:026:** | From SENATE Committee on APPROPRIATIONS: Do pass as amended. |
| **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)

CA A 1564 | Patrick Ahrens (D-026) | Failed - Adjourned | 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

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

**Status:**

| | |
|---|---|
| **Aug 13, 2026:** | In SENATE Committee on APPROPRIATIONS: Held in committee. |
| **Aug 3, 2026:** | In SENATE Committee on APPROPRIATIONS: To Suspense File. |
| **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. |
| **2026:** | In ASSEMBLY. Read second time and amended. To second reading. |
| **2026:** | From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended. |
| **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

**Topics:** Privacy- Misc | Privileged Communications | K-12 Education- Misc + Show more

9.

# California Assembly Bill 1601 (2025-2026)

CA A 1601 | Chris Rogers (D-002) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## County Employees' Retirement: Cost-of-Living Adjustment

AI-generated

This bill adds a new section to the Government Code applicable solely to Sonoma County, authorizing the county board of supervisors to grant annual cost-of-living adjustments to retirement allowances, optional death allowances, or annual death allowances payable by the county retirement system. The bill establishes the process and requirements the board of supervisors must follow prior to authorizing such adjustments.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

**Status:**

| | |
|---|---|
| **Sep 27, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-530 |
| **Sep 27, 2026:** | Signed by GOVERNOR. |
| **Sep 3, 2026:** | *****To GOVERNOR. |
| **Aug 19, 2026:** | Enrolled. |
| **Aug 18, 2026:** | In SENATE. Read third time. Passed SENATE. To enrollment. |
| **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. |
| **26:** | In ASSEMBLY. Read second time. To third reading. |
| **26:** | 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

**Topics:** Public Employee Retirement Systems | Public Employee Benefits- Other | Local Government Elected and Appointed Officials

10.

# California Assembly Bill 1619 (2025-2026)

CA A 1619 | Avelino Valencia (D-068) | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## Public Employees' Retirement: Administration

AI-generated

This bill addresses the per-meeting compensation rates for certain board members of the State Teachers' Retirement System, the Public Employees' Retirement System, and county retirement and investment boards established under the County Employees Retirement Law of 1937. The compensation rate for attendance at board and committee meetings is modified from $100 to $320 for applicable board members across these systems.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

**Status:**

| | |
|---|---|
| **Sep 27, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-533 |
| **Sep 27, 2026:** | Signed by GOVERNOR. |
| **Aug 25, 2026:** | *****To GOVERNOR. |
| **Aug 21, 2026:** | Enrolled. |
| **Aug 19, 2026:** | In SENATE. Read third time. Passed SENATE. To enrollment. |
| **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. |
| **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

**Topics:** Teacher/School Employee Retirement Systems | Public Employee Retirement Systems | Public Employees- Misc

+ Show more

11.

# California Assembly Bill 1660 (2025-2026)

CA A 1660 | Pilar Schiavo (D-040) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## Public Guardians and Public Administrators

AI-generated

This bill amends the California Probate Code to modify the authority and procedures of public guardians, public conservators, and public administrators with respect to written certifications used to take possession or control of property belonging to proposed wards, conservatees, or decedents. Changes are made to the validity period of written certifications, the required form and content of those certifications, and the obligations of financial institutions and other persons upon receipt. The bill also addresses enforcement through court-ordered monetary sanctions for non-compliance.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

[Approved by Governor September 20, 2026. Filed with Secretary of State September 20, 2026.]

**Status:**

| | |
|---|---|
| **Sep 20, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-369 |
| **Sep 20, 2026:** | Signed by GOVERNOR. |
| **Aug 25, 2026:** | *****To GOVERNOR. |
| **Aug 21, 2026:** | Enrolled. |
| **Aug 19, 2026:** | In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment. |
| **Aug 17, 2026:** | In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence. |
| **Aug 5, 2026:** | In SENATE. Read second time. To third reading. |
| **Aug 4. 2026:** | In SENATE. Read third time and amended. To second reading. |
| **2026:** | In SENATE. Read second time and amended. To third reading. |
| **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

**Topics:** Savings Accounts and Safe Deposit Boxes | Financial Institutions- Misc | Securities and Commodities

+ Show more

12.

# California Assembly Bill 1844 (2025-2026)

CA A 1844 | Blanca Pacheco (D-064) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## Judges Retirement System II: Beneficiaries

AI-generated

This bill amends the Judges' Retirement System II to modify the optional retirement payment plans available to judges. For judges retiring on or after January 1, 2027, the bill authorizes the designation of any beneficiary--not limited to a spouse--to receive post-death allowances under the optional retirement payment plans. The bill also modifies eligibility conditions for surviving spouse allowances.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**Code:**

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

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

**Status:**

| | |
|---|---|
| **Sep 27, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-553 |
| **Sep 27, 2026:** | Signed by GOVERNOR. |
| **Sep 8, 2026:** | *****To GOVERNOR. |
| **Sep 2, 2026:** | Enrolled. |
| **Aug 28, 2026:** | In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment. |
| **Aug 27, 2026:** | In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence. |
| **Aug 25, 2026:** | In SENATE. To Special Consent Calendar. |
| **Aug 17, 2026:** | In SENATE. Read second time. To third reading. |
| **Aug 13, 2026:** | In SENATE. Read second time and amended. To second reading. |
| **026:** | From SENATE Committee on APPROPRIATIONS: Do pass as amended. |
| **26:** | In SENATE Committee on APPROPRIATIONS: To Suspense File. |
| **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

**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) | Failed - Adjourned | 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)

CA A 2498 | Phillip Chen (R-059) | Failed - Adjourned | 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

AI-generated content should be reviewed for accuracy. Submit feedback

**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 | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

### Public Employees' Retirement

AI-generated

This bill amends provisions of the Education Code and Government Code governing public employee retirement systems in California, 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 membership definitions, contribution requirements, benefit calculations, investment standards, and administrative procedures across these systems. It also makes an appropriation by directing contributions to continuously appropriated retirement funds.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**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, 21020.5, 31520, 31520.1, 31520.2, 31621.7, 31622, 31639.3, 31641, 31641.2, 31641.6, 31641.20, 31641.21, and 31835 of, to add Sections 31540.5 and 31789.6 to, and to repeal Section 20411 of, the Government Code, relating to retirement, and making an appropriation therefor.**

[Approved by Governor September 14, 2026. Filed with Secretary of State September 14, 2026.]

**Status:**

**Sep 14, 2026:** Chaptered by Secretary of State. Chapter No. 2026-221
**Sep 14, 2026:** Signed by GOVERNOR.
**Sep 11, 2026:** *****To GOVERNOR.
**Sep 11, 2026:** Enrolled.
**Aug 20, 2026:** In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.
**Aug 19, 2026:** In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.
**Aug 10, 2026:** In SENATE. Read second time. To third reading.

| | |
|---|---|
| **Aug 6, 2026:** | In SENATE. Read third time and amended. To second reading. |
| **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

**Topics:** Teachers- Misc | Teacher/School Employee Retirement Systems | Public Employee Wages and Hours

+ Show more

16.

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

CA ACA 2 | Corey Jackson (D-060) | Failed - Adjourned | 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 538 (2025-2026)

CA S 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

18.

# California Senate Bill 1159 (2025-2026)

CA S 1159 | Christopher Cabaldon (D-003) and 8 Co-sponsors | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## Artificial Intelligence: Transparency and Governance

AI-generated

This bill clarifies that artificial intelligence systems, autonomous agents, and robots do not qualify as a "person," "interested person," "participant," "member of the public," or any similar term under California's core transparency and governance laws. The affected laws include the California Public Records Act, the Bagley-Keene Open Meeting Act, the Ralph M. Brown Act, the Legislative Open Records Act, the Administrative Procedure Act, the California Environmental Quality Act, and the California Coastal Act of 1976. The bill also prohibits the use of artificial intelligence to falsely represent that a natural person appeared before or engaged with a governmental agency.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**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.

[Approved by Governor September 30, 2026. Filed with Secretary of State September 30, 2026.]

**Status:**

**Sep 30, 2026:** Chaptered by Secretary of State. Chapter No. 2026-863
**Sep 30, 2026:** Signed by GOVERNOR.
**Sep 3, 2026:** *****To GOVERNOR.
**Aug 24, 2026:** Enrolled.
**:026:** In SENATE. SENATE concurred in ASSEMBLY amendments. To enrollment.
**:026:** In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE for concurrence.
**2026:** In ASSEMBLY. Ordered to third reading.
**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

19.

# California Senate Bill 1187 (2025-2026)

CA S 1187 | Maria Elena Durazo (D-026) | Enacted | Fiscal Committee (No) | Urgency Clause (Yes) | Chaptered

Effective Dates: 09/18/2026

## 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. It removes certain previously mandated obligations on eligible legislative bodies while retaining requirements for remote public access and participation. The bill is declared an urgency statute and takes effect immediately.

Show more

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**Code:**

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

[Approved by Governor September 18, 2026. Filed with Secretary of State September 18, 2026.]

**Status:**

| | |
|---|---|
| **Sep 18, 2026:** | Chaptered by Secretary of State. Chapter No. 2026-324 |
| **Sep 18, 2026:** | Signed by GOVERNOR. |
| **Sep 3, 2026:** | *****To GOVERNOR. |
| **Aug 25, 2026:** | Enrolled. |
| **Aug 24, 2026:** | In SENATE. Urgency clause adopted. SENATE concurred in ASSEMBLY amendments. To enrollment. |
| **Aug 19, 2026:** | From SENATE Committee on LOCAL GOVERNMENT: Recommend concurrence in ASSEMBLY amendments. |
| **!026:** | Re-referred to SENATE Committee on LOCAL GOVERNMENT. |
| **!026:** | Re-referred to SENATE Committee on RULES. |
| **Aug 18, 2026:** | In SENATE. Senate Rule 29.10(d) suspended. |
| **Aug 17, 2026:** | In ASSEMBLY. Read third time, urgency clause adopted. Passed ASSEMBLY. ******To SENATE for concurrence. |

| | |
|---|---|
| **Aug 3, 2026:** | In ASSEMBLY. Read second time. To third reading. |
| **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

20.

# California Senate Bill 1207 (2025-2026)

CA S 1207 | John Laird (D-017) | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

## California Conservation Corps

AI-generated

This bill amends the Government Code, Labor Code, and Public Resources Code relating to the California Conservation Corps. It modifies project scope, retirement benefit eligibility, labor law exemptions, contracting authority, and annual reporting requirements for the corps. The bill also revises legislative findings and declarations concerning the corps' mission.

Show more

AI-generated content should be reviewed for accuracy. Submit feedback

**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, 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.**

[Approved by Governor August 27, 2026. Filed with Secretary of State August 27, 2026.]

**Status:**

**Aug 27, 2026:** Chaptered by Secretary of State. Chapter No. 2026-156
**Aug 27, 2026:** Signed by GOVERNOR.
**Aug 18, 2026:** *****To GOVERNOR.
**Aug 14, 2026:** Enrolled.
**Aug 13, 2026:** In ASSEMBLY. Read third time. Passed ASSEMBLY. To enrollment.
**Aug 6, 2026:** In ASSEMBLY. Read second time. To Consent Calendar.
**)26:** From ASSEMBLY Committee on APPROPRIATIONS: Do pass. To Consent Calendar.
**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

21.

## California Senate Bill 1319 (2025-2026)

CA S 1319 | Maria Elena Durazo (D-026) | Failed - Adjourned | 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. Submit feedback

**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. |
| **[illegible]026:** | In SENATE. Read second time and amended. Re-referred to Committee on RULES. |
| **[illegible]026:** | 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

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22.

## 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:**

US S 2716

**Topics:** Social Security | Tax Issues- Misc

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23.

## United States House Bill 1700 (2025-2026)

US H 1700 | Valerie Hoyle (D-OR 04) and 40 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

24.

## United States Senate Bill 770 (2025-2026)

US S 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:**

US S 4196

**Topics:** Social Security

25.

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

US S 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

26.

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

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

### Social Security Beneficiaries

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

**Status:**

**Apr 29, 2025:** To SENATE Committee on FINANCE.
**Apr 29, 2025:** In SENATE. Read second time.
**Apr 29, 2025:** INTRODUCED.
- Collapse status history

**Topics:** Social Security | Social Services Agencies

**FOR INFORMATION ONLY**

October 22, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Ted Granger TG
Chief Financial Officer

FOR: November 4, 2026 Board of Retirement Meeting
November 10, 2026 Board of Investments Meeting

SUBJECT: **Monthly Trustee Travel and Education Report – September 2026**

Attached for your review is the monthly Trustee Travel & Education Report. This report includes events attended or canceled for the fiscal year July 1, 2026 through September 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

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# TRUSTEE TRAVEL AND EDUCATION REPORT
## FOR FISCAL YEAR 2026 - 2027
## SEPTEMBER 2026

| Attendee | | Purpose of Travel - Location | Event Dates | Travel Status |
|---|---|---|---|---|
| **Nancy Durazo** | | | | |
| V | - | Edu - National University - Financial Management (Weekly Courses) - VIRTUAL | 07/20/2026 - 08/17/2026 | Attended |
| **Mike Gatto** | | | | |
| B | - | Edu - TIDE - Spark 2026 - Rancho Palos Verdes CA | 07/07/2026 - 07/08/2026 | Attended |
| **Elizabeth Ginsberg** | | | | |
| B | - | Edu - UC Irvine - Audit Committee Summit 2026 - Irvine CA | 09/18/2026 - 09/18/2026 | Attended |
| **Patrick Jones** | | | | |
| A | 1 | Edu - PPI - Summer Roundtable 2026 - Toronto Canada | 07/22/2026 - 07/24/2026 | Attended |
| B | - | Edu - TIDE - Spark 2026 - Rancho Palos Verdes CA | 07/07/2026 - 07/08/2026 | Attended |
| | - | Edu - SuperReturn - Venture US West 2026 - Los Angeles CA | 09/14/2026 - 09/14/2026 | Attended |
| | - | Edu - iDAC, Inc. - 5th Annual Global Summit on Talent Maximization 2026 -Newport Beach CA | 09/22/2026 - 09/25/2026 | Attended |
| | - | Edu - Hispanic Heritage Foundation (HHF) - 13th Investors Forum - San Francisco CA | 09/24/2026 - 09/24/2026 | Attended |
| **Shawn Kehoe** | | | | |
| V | - | Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL | 07/23/2026 - 07/23/2026 | Attended |
| **Aleen Langton** | | | | |
| A | 1 | Edu - SACRS - Public Pension Investment Management Program - Berkeley CA | 07/19/2026 - 07/22/2026 | Attended |
| | 2 | Edu - CALAPRS - Principles of Pension Governance for Trustees - Santa Barbara CA | 08/24/2026 - 08/27/2026 | Attended |
| V | - | Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL | 07/23/2026 - 07/23/2026 | Attended |
| | - | Edu - Nasdaq - Quantum's Real Risk: Board Complacency - VIRTUAL | 09/18/2026 - 09/18/2026 | Attended |
| **Nicole Mi** | | | | |
| B | - | Edu - AAPI - LEAD National Summit 2026 - Los Angeles CA | 07/17/2026 - 07/19/2026 | Attended |
| | - | Edu - AAAIM - Elevate Conference 2026 - San Francisco CA | 09/21/2026 - 09/23/2026 | Attended |
| V | - | Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL | 07/23/2026 - 07/23/2026 | Attended |
| **Lisa Proft** | | | | |
| A | 1 | Edu - CALAPRS - Principles of Pension Governance for Trustees - Santa Barbara CA | 08/24/2026 - 08/27/2026 | Attended |
| **David Ryu** | | | | |
| A | 1 | Edu - Opal Group - Public Funds Summit 2026 - Newport RI | 07/27/2026 - 07/29/2026 | 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

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

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

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

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