



ALAMEDA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION  
*BOARD OF RETIREMENT*  
MINUTES

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**Thursday, September 15, 2016**

Chair Ophelia Basgal called the meeting to order at 2:00 p.m.

Trustees Present: Dale Amaral  
Ophelia Basgal  
Annette Cain-Darnes  
Keith Carson  
Tarrell Gamble  
Liz Koppenhaver  
Elizabeth Rogers  
George Wood  
Darryl Walker (Alternate)

Trustees Excused: Donald White  
David Safer (Alternate)

Staff Present: Margo Allen, Fiscal Services Officer  
Victoria Arruda, Human Resources Officer  
Angela Bradford, Executive Secretary  
Kathy Foster, Assistant Chief Executive Officer  
Harsh Jadhav, Chief of Internal Audit  
David Nelsen, Chief Executive Officer  
Betty Tse, Chief Investment Officer

Staff Excused: Sandra Dueñas, Benefits Manager

**16-116**

**The minutes of the regular meeting of August 18, 2016, were accepted on a motion by Dale Amaral seconded by Tarrell Gamble, and approved by a vote of 7 yes (*Amaral, Basgal, Cain-Darnes, Gamble, Rogers, Safer, Wood*), 0 no, and 1 abstention (*Koppenhaver*).**

**CONSENT CALENDAR  
REPORTS AND ACTION ITEMS**

**APPLICATION FOR SERVICE RETIREMENT**

*Appendix A*

**APPLICATION FOR RETIREMENT, DEFERRED**

*Appendix B  
Appendix B-1*

**APPLICATION FOR DEFERRED TRANSFER**

*Appendix C*

**LIST OF DECEASED MEMBERS**

*Appendix D*

**REQUESTS FOR 130 BI-WEEKLY PAYMENTS TO RE-DEPOSIT  
CONTRIBUTIONS AND GAIN CREDIT**

*Appendix E*

**APPLICATION FOR DISABILITY RETIREMENT – NON CONTESTED ITEMS:**

*Appendix F*

**APPLICATION FOR DISABILITY RETIREMENT HEARING OFFICER  
RECOMMENDATIONS**

*Appendix G*

**APPROVAL COMMITTEE MINUTES**

- *August 18, 2016, Budget Committee Minutes.*

**MISCELLANEOUS MATTERS**

- *None.*

**16-117**

It was moved by Elizabeth Rogers, seconded by Annette Cain-Darnes, and approved by a vote of 7 yes (*Basgal, Cain-Darnes, Gamble, Koppenhaver, Rogers, Safer, Wood*) (*Amaral recused*), 0 no, 0 abstentions, that the following resolution is adopted:

**BE IT RESOLVED BY THIS BOARD** that the Consent Calendar is approved as presented.

**REGULAR CALENDAR – REPORTS AND ACTION ITEMS**  
**DISABILITIES, CURRENT AND CONTINUING RECOMMENDATIONS, AND**  
**MOTIONS**

- None

**COMMITTEE REPORTS, RECOMMENDATIONS AND MOTIONS**

*Note: Per Committee Chairs, copies of the Committee meeting minutes were available for attendees. All **August/September** Committee meeting minutes are posted on the ACERA website ([www.acera.org](http://www.acera.org)) after approval at the **September 15, 2016**, Board meeting. This month's Committee reports were presented in the following order:*

***Operations:***

Dale Amaral reported that the Operations Committee met on September 7, 2016, at 9:31 a.m. and highlighted the following:

Staff presented a request from Superior Court to review a new pay item for bilingual employees who utilize a language other than English for more than 10 hours per pay period while conducting the business of the Court.

**16-118**

**It was moved by Dale Amaral and seconded by Liz Koppenhaver to approve the inclusion of Pay Item 227 Bilingual Pay 10 Hours+ as compensation earnable and pensionable compensation for members with entry dates before, on or after January 1, 2013. The motion carried 8 yes (*Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood*), 0 no, 0 abstentions.**

Staff presented a request from Alameda County to review a new pay item which would provide an additional 10% compensation for classification 1137-Administrative Associate while assigned as lead in the CAO Assessment Appeals Unit to assist with the coordination of Statement of Economic Interest Form 700 process.

**16-119**

**It was moved by Dale Amaral and seconded by Elizabeth Rogers to designate Pay Item 41Q – Lead Duties-CAO Assessment Units as not pensionable compensation for a member (PEPRA) with an entry date on or after January 1, 2013, based on Government Code Section 7522.34, and approve the inclusion of this pay item as compensation earnable for a member (legacy) with an entry date prior to January 1, 2013, based on Government Code Section 31461. The motion carried 8 yes (*Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood*), 0 no, 0 abstentions.**

Staff presented the year-to-date operating expenses – budget vs. actual. As of July 31, 2016, actual expenses are \$830,208 under budget.

**16-120**

**It was moved by Dale Amaral and seconded by Liz Koppenhaver to approve the September 7, 2016, Operations Committee minutes. The motion carried 8 yes (Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood), 0 no, 0 abstentions.**

***Investment:***

George Wood reported that the Investment Committee met on September 14, 2016, at 9:37 a.m. and highlighted the following:

Based on feedback provided by the Trustees from the previous Investment Committee Meeting (8/10/2016), Staff updated the Committee on the changes made to revise the proposed evaluation matrix as follows: Investment Management weighting from 20 to 25 points, Performance and Risk from 25 to 30 points, and Fees from 25 to 15 points, while Organization and Compliance weights remained at 20 points and 10 points, respectively. Staff has also revised the proposed search criteria to be consistent with the General Investment Guidelines, Policies, and Procedures.

Staff also made a correction to the Proposed Timeline with the corrected dates for the Board Meeting which will be held on September 15 and not on September 22 and the November ICM meeting which will be held on November 16, not November 9.

**16-121**

**It was moved by George Wood and seconded by Keith Carson to adopt the Proposed Timeline, search criteria, and evaluation matrix for ACERA’s Passive Indices (U.S. and International Equities) Manager Search. The motion carried 8 yes (Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood), 0 no, 0 abstentions.**

For 2Q2016, ACERA’s Total Fund returned 1.3% (gross) compared to the policy index return of 1.8%. For the year ending 6/30/2016, the Total Fund returned –1.6% (gross) compared to the Policy Index of 0.7%. The Total Fund’s results ranked in the 85th and 91st percentiles for the quarter and one year periods, respectively.

For 2Q2016, ACERA’s U.S. Equity, International Equity, and Fixed Income asset classes returned 2.3%, –0.8%, and 2.8% (gross) compared to their benchmarks 2.6%, –0.5%, and 2.8%, respectively. On a 1-year basis, these asset classes returned –2.5%, –8.5%, and 5.2%, respectively.

As of 6/30/16, U.S. Equity accounted for 32.5% of the Total Fund, International Equity 27.6%, Fixed Income 17.1%, Real Estate 7.5%, PEARLS 11.4%, and Real Assets 3.8%. As of 3/31/2016, the market value of the Total Fund was \$6,655,450,073.

ACERA's real estate portfolio returned 2.1% (net) for 2Q 2016 and 12.7% (net) for the 1-year period ending 06/30/2016 compared to the NCREIF-ODCE benchmark of 1.9% (net) and 10.8% (net), respectively.

The total market value of ACERA's real estate portfolio was \$497.8 million, approximately 7.5% of ACERA's total Fund.

Staff presented its proposed Timeline, Search Criteria, and Evaluation Matrix to the Committee for its consideration and possible input. Staff pointed out the following elements for emphasis:

- The proposed Timeline indicates a search period of nine months, ending in May of 2017.
- In the Search Criteria, any responding consultant: (i) must agree to act as a fiduciary to ACERA and (ii) separates discretionary and non-discretionary practices, if available.
- In the evaluation matrix, staff highlighted the importance of Firm Independence which represents 20% of the total score, and the absence of conflicts (ability to provide objective advice).

Staff plans to present this item for formal action at the next ICM.

### **16-122**

**It was moved by George Wood and seconded by Keith Carson that the Board approve the September 14, 2016, Investment Committee minutes. The motion carried 8 yes (*Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood*), 0 no, 0 abstentions.**

#### ***Audit:***

Trustee Tarrell Gamble gave an oral report regarding the September 14, 2016, Audit Committee meeting and reported that as result of ACERA Fiscal Services Department's Request for Proposal for audit services for years 2016 through 2020 (RFP), representatives of Brown Armstrong, Certified Public Accountants, and the Incumbent Firm, Williams Adley and Company (WACO), presented proposals outlining the type of auditing services it could provide to ACERA.

After the presentations, the Staff was directed to obtain additional information regarding both Firms for consideration by the Committee/Board prior to making a selection. This item was postponed until the October 2016 Audit Committee meeting, along with the Information items. No action was taken.

*(Note: The formal written September 14, 2016, Audit Committee minutes will be included for approval on the October 21, 2016, Board Consent Calendar.)*

**Governance:**

Trustee Elizabeth Rogers gave an oral report regarding today's Governance Committee meeting and recommended affirmation of the Retiree Payroll Deduction and Assignment of Benefit Policy without revisions.

**16-123**

**It was moved by Elizabeth Rogers and seconded by Dale Amaral to affirm the Retiree Payroll Deduction and Assignment of Benefit Policy without revisions as recommended by the Committee. The motion carried 8 yes (Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood), 0 no, 0 abstentions.**

Trustee Rogers recommended affirmation of the *Securities Litigation Policy*, which included one minor revision.

**16-124**

**It was moved by Elizabeth Rogers and seconded by Liz Koppenhaver to affirm the Securities Litigation Policy with revision as recommended by the Committee. The motion carried 8 yes (Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood), 0 no, 0 abstentions.**

Trustee Rogers reported that the Governance Committee had an in-depth discussion regarding the revisions to the Behested Gifts/Payments section of the *Conflict of Interest Policy*. After discussion, Staff was directed to make additional revisions to the Policy and bring it back to the Committee for consideration at its November 2016 meeting. No action was taken.

*(Note: The formal written September 15, 2016, Governance Committee minutes will be included for approval on the October 21, 2016, Board Consent Calendar.)*

**OLD BUSINESS**

- None

**NEW BUSINESS**

Chief Executive Officer David Nelsen requested authority from the Board to vote as ACERA's proxy on behalf of the Board of Retirement at the SACRS Fall Conference. It was noted that SACRS does not have a list of its Business items to be voted on at this time.

**16-125**

**It was moved by Annette Cain-Darnes and seconded by Elizabeth Rogers to direct the Chief Executive Officer to vote as ACERA’s proxy on behalf of the Board of Retirement at the SACRS Fall Conference. The motion carried 8 yes (*Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood*), 0 no, 0 abstentions.**

**AB 2833 and Legislation Status**

Associate Counsels Lori K. Schnall and Susan L. Weiss presented their September 14, 2016, memo regarding the status of California Assembly Bill (AB) 2833, Public investment funds; disclosures. Ms. Schnall reported that the bill was signed by the Governor today and stated that California is the first state to pass greater disclosure laws.

Associate Counsel Susan L. Weiss provided a high-level overview of the new legislation and noted that the alternative investment firms must now provide greater disclosure regarding its fees and expenses, carried interests, and the gross and net rate of return for each of ACERA’s investment funds. It was noted that pension funds (ACERA) must also disclose this information annually at a public Board meeting. The new law applies to contracts as of or after January 1, 2017, and Staff will evaluate whether the new law, applies to existing contracts where additional commitments have been made after January 1, 2017. The language is somewhat ambiguous; therefore, more analysis will be required before Staff can opine to the Board concerning changes that may need to be implemented to comply with the new law. It was noted that even though there is a cost connected to the disclosure requirements of the new law, the legislator will not help fund this effort. The potential impact to ACERA is that some fund managers may not want to continue to contract with ACERA because it is a smaller plan.

In order to get a better understanding of the new legislation, this issue will be further discussed in-depth at the next Investment Committee meeting. Ms. Weiss anticipated that CALAPRS and SACRS will be forums in which the new law will be discussed and analyzed.

**Carlos Becknell Appeal:**

Assistant CEO Kathy Foster presented her September 15, 2016, memo regarding Mr. Carlos Becknell’s appeal of retirement allowance correction from Option 2 to Unmodified Option due to non-member status. Mr. Becknell was present and was afforded an opportunity to be heard at today’s Board meeting. Ms. Foster provided a summary of Mr. Becknell’s appeal stating he is a non-member receiving a retirement benefit from ACERA as a result of a dissolution of marriage proceeding involving an ACERA retired member (Piccola Titus). Ms. Foster stated that Mr. Becknell was offered an Option 2 retirement allowance in 2004, which provided a 100% monthly continuance to his named beneficiary. Subsequently, ACERA’s Legal counsel advised that the law does not provide an option for continuance of benefits to non-members’ beneficiaries and that the only death benefit that would be available to Mr. Becknell’s beneficiary would be any unpaid retirement allowance at the time of his death and/or any unused contributions.

In February 2016, ACERA Benefits Staff notified Mr. Becknell of the error and made the necessary adjustments to his benefit to reflect the Unmodified Option amount.

Mr. Becknell expressed his disappointment and requested that the Board consider granting him some type of compensation due to the error, as it will have a significant impact on him and his beneficiary. ACERA's Outside Counsel Ashley Dunning, Nossaman, LLP, explained that in accordance to Government Code Section 31685, continuance of benefits cannot be provided to a non-member and that the Solano County's Court Order, which has jurisdiction over this matter, regarding Mr. Becknell's community property division and distribution specifically states that Mr. Becknell is not entitled to a survivor's benefit from ACERA.

On behalf of the ACERA Board and Staff, Board Chair Ophelia Basgal apologized to Mr. Becknell for the error and acknowledged that the Board's decision to deny his appeal will have a significant impact, but explained that the Board is required to comply with the law. It was noted that Mr. Becknell will receive retroactive pay, including interest and cost of living adjustments, for the period of 2004 through 2016.

#### **16-126**

**It was moved by George Wood and seconded by Liz Koppenhaver to deny Mr. Carlos Becknell's appeal, and to affirm ACERA's decision to correct his retirement allowance election from Option 2 to the Unmodified Option due to non-member status. The motion carried 8 yes (*Amaral, Basgal, Cain-Darnes, Carson, Gamble, Koppenhaver, Rogers, Wood*), 0 no, 0 abstentions.**

#### **David Nelsen, Chief Executive Officer's Report**

Chief Executive Officer David Nelsen presented his September 15, 2016, written CEO Report, which provided an update on the following items: **1)** Senior Manager Recruitment; **2)** Committee/Board Action Items; **3)** Conference Schedule; **4)** Core Values Development; and **5)** CEO Outreach. It was noted that some of these tasks have been completed.

Mr. Nelsen announced that Friday, September 9, 2016, was ACERA Chief Counsel Joseph Fletcher's last day at ACERA. However, Mr. Fletcher will continue to communicate and work with Mr. Nelsen in the interim to ensure that the transition to a new Chief Counsel is successful. Mr. Nelsen announced that all Legal Department Staff will report to him directly and that Ms. Ashley Dunning will also assist with certain legal issues.

It was noted that if the Board or Staff had any legal issues that arise during the recruitment process, those issues are to be routed through Mr. Nelsen and he will forward those issues to the appropriate Legal Staff. Mr. Nelsen expressed his appreciation for Mr. Fletcher's contributions to ACERA and stated that he will be missed. Mr. Nelsen is scheduled to meet with the County's Human Resources Officer on September 16, 2016, to begin the Chief Counsel Recruitment process.



Mr. Nelsen explained that Marguerite M. Malloy, Susan L. Weiss, and Lori K. Schnall, ACERA's in-house attorneys, are assigned to handle specific legal areas, but that each of them is capable of handling any legal issue(s) that may arise. Mr. Nelsen further explained the responsibilities and functions of the three Administrative Support Staff in the Legal Department. Board Chair Basgal suggested that Mr. Nelsen provide an organizational chart reflecting the areas of responsibility and functions being performed by the Legal Department Staff.

**Marin Case:**

Ms. Dunning provided an update on the decision in the *Marin Association of Public Employees, et al. v. Marin County Employees' Retirement Association, et al.* matter announcing that the case is pending in the First District Court of Appeal, Division 2, and stated that the Plaintiffs' in this matter will most likely file a *Petition for Review* with the California Supreme Court (of Appeal). This matter addresses the issue of the implementation of the California Public Employees' Pension Reform Act (PEPRA) provision, which excludes certain pay items from public pension fund systems employees' calculation of retirement benefits. Ms. Dunning reported that in or around August 2016, the First District Court of Appeal issued an extensive decision known as the *MAPE* case, which is the first of the cases that challenged the constitutionality of the PEPRA provision that applies to legacy members (of California's 20 County Retirement Systems that operate under the County Employees Retirement Law of 1937 (CERL)). This provision is at issue (with the Court?) known as the *Consolidated Cases* that ACERA is a part of.

Ms. Dunning reported that the only two pay types that are still at issue in the *Marin* case are: *1)* Stand By (additional payments for services rendered outside of normal working hours); and *2)* in-kind conversions (a discretionary provision in the statute). There was no settlement agreement or class action judgment that was dealt with in this case – no vacation leave related issues.

Ms. Dunning gave a high-level overview of the issues in the *MAPE* case and noted that the Court upheld the constitutionality of the PEPRA provision. Ms. Dunning reported that *Marin* presented argument regarding that the "plan and affect" (the '37 Act's definition of "compensation earnable"). Ms. Dunning reported that the Court decision that PEPRA was constitutional was a surprise, as it was not based on the analysis presented to the Court by the retirement system or by the Attorney General. Ms. Dunning further reported that the Court took issue with the following statement, "...*In order to change a vested benefit of a member, a comparable benefit must be provided...*" the Court opined that the statement was a misreading of case law and the standard should be "**should**" rather than "**must...**" However, the most significant issue from the perspective of future legal developments is the very board language regarding "reasonable pension" being the standard opposed to the promises made to member regarding their employment. Ms. Dunning announced that the filing due date for the *Petition for Review* is September 26, 2016, and that the Court has 60 days to render a decision.

**Contra Costa Case:**

Ms. Dunning also provided an update regarding the *Contra Costa County Superior Court's* decision wherein the Court also concluded that the PEPRRA provision is constitutional, but carved out a couple of “estoppel classes” whereas the Court said, “...notwithstanding the fact that the statute is constitutional in the *Contra Costa and Merced* cases, there are people who should continue to be able to receive certain benefits that are not permitted under PEPRRA, because of the circumstances of those cases...” There was also an estoppel component decision regarding standby pay. Ms. Dunning explained that the two exceptions mentioned above could potentially be placed in an estoppel class and stated that the *MAPE* decision also addressed estoppel. Ms. Dunning will provide the Board with updates regarding the Court’s decision in this matter. It was noted that Ms. Dunning authored an *E-Alert* regarding this issue, which was provided to the Board.

An audience member inquired about the types of pay codes that were addressed in this matter, they are: administrative response time, on-call, standby, and similar types of pay codes, and conversions for certain types of medical benefits (receive cash in lieu of medical benefits). In-kind conversion was not address in this matter and was not a part of ACERA’s case.

Board Chair Basgal suggested that the October 20th Board be combined with the October 21st Board Off-Site and stated that any “critical” action items can be addressed at that time. Mr. Nelsen will follow-up with the Senior Leaders to determine whether any non-critical agenda items can be postponed until the November Board meeting.

**CONFERENCE REPORTS**

- None.

**ANNOUNCEMENTS**

- None.

**PUBLIC INPUT**

- None.

**BOARD INPUT**

- None.

**ESTABLISHMENT OF THE NEXT MEETING**

Friday, October 21, 2016, at 2:00 p.m.

**ADJOURNMENT INTO CLOSED EXECUTIVE SESSION:**

- A. Personnel Matter pursuant to Gov. Code §54957 & 88 Ops. Cal. Atty. Gen. 16 – Disability Application of Raghbinder Sahota – Community Development.

**RECONVENE INTO OPEN SESSION TO REPORT ON ACTION TAKEN IN CLOSED EXECUTIVE SESSION:**

The Board reconvened into Open Session and announced the following:

**16-127**

**It was moved by Annette Cain-Darnes and seconded by Dale Amaral that the Board adopt the Hearing Officer’s Recommendation and deny Raghbinder Sahota’s application for Earlier Effective Date–Non-Service Connected Disability Retirement. The motion carried 4 yes (*Amaral, Basgal, Cain-Darnes, Koppenhaver*) 2 no (*Gamble, Rogers*), and 1 abstention (*Walker*).**

**ADJOURNMENT**

The meeting adjourned at approximately 3:27 p.m.

Respectfully Submitted,



\_\_\_\_\_  
David Nelsen  
Chief Executive Officer

10/21/16

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Date Adopted

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**APPENDIX A  
APPLICATION FOR SERVICE RETIREMENT**

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ADAMS, Kay C.

Effective: 4/1/2016

Public Health

GREEN, Margo R.

Effective: 3/26/2016

Social Services Agency

BRUNN, Connie M.

Effective: 4/1/2016

Child Support Services - DEF

GUERRERO, Melinda R.

Effective: 3/31/2016

Superior Court

CHING, Chi K.

Effective: 4/1/2016

Behavioral Health Care Services

MARSHALL-CATO, Vanessa J.

Effective: 3/12/2016

Public Defender

CULBERTSON, Ingrid M.

Effective: 3/26/2016

ACERA

MONTIJO, Ray

Effective: 5/25/2016

LARPD

DEAN, Leonard L.

Effective: 6/11/2016

Social Services Agency

MUNOZ, Lourdes O.

Effective: 3/1/2014

Social Services Agency

ELIAS, Erasmo E.

Effective: 4/1/2016

Public Defender

PEREZ, Paul C.

Effective: 3/23/2016

Public Defender

GHEBREMEDHIN, Alganesh H.

Effective: 1/2/2016

General Services Agency

SANCHEZ, Andrew

Effective: 5/6/2016

Public Works Agency

STEEL-SABO, Kathryn L.

Effective: 1/30/2016

Library

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**APPENDIX B  
APPLICATION FOR DEFERRED RETIREMENT**

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BANKS, Anthony B.  
District Attorney  
Effective: 6/10/2016

GAONA, Samantha  
Public Health  
Effective: 3/14/2016

BILL, Yomiko  
Superior Court  
Effective: 7/5/2016

GHANGAS, Manjit K.  
Alameda Health System  
Effective: 5/2/2016

BRISCOE, Alexander K.  
Health Care Services Agency  
Effective: 4/8/2016

GONOPOLSKY, Howard  
Alameda Health System  
Effective: 3/28/2016

CANSINO, Rachel T.  
Public Health  
Effective: 7/8/2016

GORDON, Joseph H.  
Board of Supervisors  
Effective: 7/1/2016

CAPOCCI, Gregory A.  
Sheriff's Office  
Effective: 3/11/2016

GREGORY, Daniel J.  
Alameda Health System  
Effective: 6/7/2016

COHEN, Patrick D.  
Sheriff's Office  
Effective: 5/6/2016

GWIASDA, Victoria E.  
District Attorney  
Effective: 2/5/2016

CRANE, Ellen E.  
Alameda Health System  
Effective: 2/21/2016

HALL, Laurie  
ACERA  
Effective: 4/18/2016

DAVIS, Diane L.  
Social Services Agency  
Effective: 4/27/2016

JACKSON, Kristina E.  
Superior Court  
Effective: 5/18/2016  
Years of Service: 5.77944 years

DEGAUD-OBROU, Colette H.  
Alameda Health System  
Effective: 6/24/2016

JOHNSON, Kameelah J.  
Social Services Agency  
Effective: 7/15/2016

ESCOBAR, Yvette  
First 5  
Effective: 5/6/2016

LEE, Christina R.  
Social Services Agency  
Effective: 3/25/2016

FERREYRA CORDOVA, Jaisel  
Information Technology  
Effective: 5/13/2016

LOVELADY, Robert E.  
Child Support Services  
Effective: 2/26/2016

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**APPENDIX B  
APPLICATION FOR DEFERRED RETIREMENT**

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MARTINEZ, Daniel J.  
Sheriff's Office  
Effective: 2/9/2016

ROBLES, James H.  
County Administrator  
Effective: 3/2/2016

MC MAHON, Colleen F.  
District Attorney  
Effective: 2/26/2016

SAGE, Courtney B.  
Behavioral Health Care Services  
Effective: 2/11/2016

MENSINGER, Maegan N.  
Sheriff's Office  
Effective: 2/11/2016

SMITH, Trena L.  
Sheriff's Office  
Effective: 4/21/2016

MILLER, Steven D.  
Public Works Agency  
Effective: 3/11/2016

WATSON, DeAndre L.  
Superior Court  
Effective: 5/11/2016

OWENS, Kenneth R.  
Probation  
Effective: 6/24/2016

WELDON, Jana L.  
Community Development Agency  
Effective: 2/26/2016

PAULSEN, Todd A.  
District Attorney  
Effective: 6/10/2016

WHITE, Gail A.  
Social Services Agency  
Effective: 5/6/2016

PLATE-ORTEGA, Erich I.  
ACERA  
Effective: 6/3/2016

WILSON, Anita R.  
Alameda Health System  
Effective: 4/22/2016

RIGG, Brian P.  
Sheriff's Office  
Effective: 3/26/2016

WILSON, Durand  
Auditor-Controller  
Effective: 2/5/2016

RIVERA, Norma P.  
Public Defender  
Effective: 5/20/2016

YOUNGBLOOD, DayVonna M.  
Assessor  
Effective: 1/19/2016

**APPENDIX B-1  
APPLICATION FOR NON-VESTED DEFERRED**

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ALMARANTE TERRERO, Carolina  
Superior Court  
Effective: 3/28/2016

BRUCE, Patricia R.  
District Attorney  
Effective: 3/11/2016

ARY, Kandalena T.  
Behavioral Health Care Services  
Effective: 4/22/2016

CARPIO, Von Marco  
Library  
Effective: 3/7/2016

BAGGETT, Travis J.  
Zone 7  
Effective: 5/16/2016

CHEN, Louie  
Superior Court  
Effective: 5/20/2016

BALLADARES, Claudia E.  
Social Services Agency  
Effective: 6/24/2016

CHUN, Nicholas M.  
Sheriff's Office  
Effective: 7/12/2016

BANKS, Sevaughn D.  
Social Services Agency  
Effective: 5/18/2016

DELEFORGE, Michel D.  
Information Technology  
Effective: 7/1/2016

BEESLEY, Amy  
Superior Court  
Effective: 1/15/2016

DUFFY, Adam J.  
Sheriff's Office  
Effective: 6/8/2016

BEITH, Ashley K.  
Zone 7  
Effective: 6/30/2016

ESPINOZA, Melissa  
Public Health  
Effective: 6/17/2016

BETTENCOURT, David A.  
Alameda Health System  
Effective: 5/20/2016

GATES, Brandi S.  
Public Health  
Effective: 1/9/2016

BONILLA, Veronica  
Alameda Health System  
Effective: 5/24/2016

GINES, Maribeth E.  
Alameda Health System  
Effective: 5/20/2016

BOUCHER-DA LA CADENA, Manuela  
Superior Court  
Effective: 5/20/2016

GOALDER, Shawnelle L.  
Social Services Agency  
Effective: 5/27/2016

BOWMAN, Gilbert C.  
Zone 7  
Effective: 6/30/2016

GUZMAN, Mario R.  
Social Services Agency  
Effective: 4/11/2016

BROWN, William D.  
Social Services Agency  
Effective: 3/18/2016

HENDERSON, Letitia S.  
Probation  
Effective: 7/8/2016

**APPENDIX B-1  
APPLICATION FOR NON-VESTED DEFERRED**

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HINOJOS, Frank A.  
General Services Agency  
Effective: 2/18/2016

LOBO, Amelia Q.  
Behavioral Health Care Services  
Effective: 4/1/2016

HOLMES, Angelica  
Child Support Services  
Effective: 5/25/2016

MASTER, Sara  
Superior Court  
Effective: 4/1/2016

ISAACS, Eli  
Housing Authority  
Effective: 5/12/2016

MATHEKAR, Suruchi S.  
Information Technology  
Effective: 4/29/2016

JOHNSON, Rachel R.  
Sheriff's Office  
Effective: 5/14/2016

MC CARTHY, Marybeth  
Social Services Agency  
Effective: 6/30/2016

JOSHI, Kunjal S.  
Sheriff's Office  
Effective: 7/1/2016

MIKOSZ, Christina A.  
Public Health  
Effective: 4/29/2016

KNUTSON, Maria  
Alameda Health System  
Effective: 5/6/2016

MONTALVAN, Ryan  
Social Services Agency  
Effective: 6/17/2016

KOVACH, Iris R.  
Alameda Health System  
Effective: 3/2/2016

MORGAN, Haley  
Alameda Health System  
Effective: 6/5/2016

KWONG, Jamie C.  
Child Support Services  
Effective: 7/15/2016

MUNOZ, Christian M.  
Probation  
Effective: 6/10/2016

LAM, Fung Yan  
Social Services Agency  
Effective: 2/19/2016

NALLS, Jerry D.  
General Services Agency  
Effective: 4/29/2016

LANG, Jonathan S.  
Auditor-Controller  
Effective: 5/6/2016

NG, Darrin  
Superior Court  
Effective: 6/29/2016

LEVINSOHN, Susan F.  
Alameda Health System  
Effective: 1/6/2016

NORMAN, Shawna A.  
Social Services Agency  
Effective: 2/19/2016



**APPENDIX B-1  
APPLICATION FOR NON-VESTED DEFERRED**

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ORTIZ, Maria L.  
Behavioral Health Care Services  
Effective: 4/7/2016

SANDOVAL CONTRERAS, Nalleli Y.  
Social Services Agency  
Effective: 3/18/2016

PATE, Cherese  
Alameda Health System  
Effective: 3/1/2016

SHARMA, Vickramjit  
District Attorney  
Effective: 2/26/2016

PEDROZA, Felicita  
Public Health  
Effective: 4/8/2016

SHI, Yun  
Sheriff's Office  
Effective: 6/3/2016

PENNINGTON, Dovetta C.  
Alameda Health System  
Effective: 1/26/2016

SNEDIGAR, Katherine E.  
Social Services Agency  
Effective: 7/8/2016

PENTICOFF, Jamie M.  
Social Services Agency  
Effective: 4/8/2016

THOMAS, Kiesha R.  
Social Services Agency  
Effective: 2/19/2016

PETROMILLI, Emily T.  
Alameda Health System  
Effective: 5/5/2016

UWAECHIE, Elaine C.  
Child Support Services  
Effective: 5/13/2016

PINCKNEY, Bonnie  
Alameda Health System  
Effective: 4/23/2016

VERA, Lynne T.  
Alameda Health System  
Effective: 6/20/2016

RIVARD, Justin J.  
Alameda Health System  
Effective: 2/10/2016

ZEITER, Paula  
Alameda Health System  
Effective: 5/20/2016

ROBINSON TATE, Agnes L.  
Social Services Agency  
Effective: 2/26/2016

ZIMMERMAN, Krista  
Alameda Health System  
Effective: 2/10/2016

SAID, Safwat  
Information Technology  
Effective: 7/7/2016

ZITA, Elaine V.  
Environmental Health  
Effective: 4/21/2016

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**APPENDIX C  
APPLICATION FOR DEFERRED TRANSFER**

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FONTANA, Alexandria D.

Environmental Health

Effective: 5/20/2016

Transferred to: Stanislaus County Employees' Retirement Association

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**APPENDIX D  
LIST OF DECEASED MEMBERS**

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Agpalo, Victor P.  
8/24/2016  
Sheriff's Office

Kobayashi, Sayoko M.  
8/5/2016  
Survivor of Minoru Kobayashi

Brest, Lenore G.  
8/11/2016  
Behavioral Health Care Services

Lanzar, Myrna S.  
8/16/2016  
Health Care Services Agency

Carter, David  
7/6/2016  
Survivor of Mildred L. Carter

Lockhart, Bradley D.  
8/21/2016  
Sheriff's Office

Chalifour, Raymond E.  
7/19/2016  
Public Works Agency - DEF

Mainard, Donna J.  
8/5/2016  
Alameda Health System

Childress, Lisa A.  
8/2/2016  
Social Services Agency

Marino, Joseph A.  
8/17/2016  
Behavioral Health Care Services

Danielson, Mary W.  
7/29/2016  
Survivor of William F. Danielson

Mitchell, Alfred H.  
8/4/2016  
Sheriff's Office

Getmanskiy, Vladislav V.  
8/10/2016  
Alameda Health System - DEF

Mitchell, Anne  
8/17/2016  
Survivor of Charles P. Mitchell

Harbison, Chessie L.  
4/3/2015  
Survivor of Willie Harbison

Moore, John D.  
8/10/2016  
Sheriff's Office

Hudgins, Hazel  
8/1/2016  
Alameda Health System

Norton, Geraldine M.  
8/27/2016  
Survivor of Richard W. Norton

Jiles, Mildred M.  
7/5/2016  
Public Health

Reid, James L.  
8/23/2016

Johnson, Patricia A.  
7/30/2016  
Information Technology - DEF

Serrano, Loreta M.  
7/24/2016  
Social Services Agency

Kernan, James M.  
8/26/2016  
Assessor

Steele, Sydney M.  
3/2/2016  
Survivor of Olive E. Steele

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**APPENDIX D  
LIST OF DECEASED MEMBERS**

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Tiers, Kenneth A.  
7/31/2016  
Sheriff's Office

Tiers, Kenneth A.  
7/31/2016  
Survivor of Carol T. Tiers

Wilson, Donald J.  
8/10/2016  
General Services Agency

York, Jack M.  
2/9/2016  
Sheriff's Office

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**APPENDIX F**  
**APPLICATION FOR DISABILITY RETIREMENT**

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**Name:** **Breslin, Gregory**  
**Type of Claim:** Service Connected – Reciprocal Member

Staff's Recommendation:

Staff recommends that Mr. Breslin be approved for a service connected disability retirement based on his reciprocal membership in the San Francisco Employees' Retirement System, and in accordance with Section 31838.5, award him a monthly benefit of \$696.03 as of December 17, 2014, that may be adjusted prospectively to take account of any subsequent COLA adjustments from SFERS.

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**Name:** **Howard, Gwendolyn**  
**Type of Claim:** Service Connected

Staff's Recommendation:

Approve the recommendation contained in Dr. Robert Wagner's report to grant Ms. Howard a service connected disability. Since Ms. Howard is over 55 years old, future annual medical examinations will not be required.

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**Name:** **Moffett, Deborah**  
**Type of Claim:** Service Connected

Staff's Recommendation:

Approve the recommendation contained in Dr. Wagner's report to grant Ms. Moffett a service connected disability. Since Ms. Moffett is over 55 years old, future annual medical examinations will not be required.

Based on Dr. Wagner's and Staff's review and determination of Ms. Moffett's ability to determine the permanency of her incapacity, to grant Ms. Moffett's request for an earlier effective date.

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**APPENDIX F**  
**APPLICATION FOR DISABILITY RETIREMENT**

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**Name:** **Reed, Erica**  
**Type of Claim:** Annual Review for SCD (Granted on 9/15/2011)

Staff's Recommendation:

Approve the recommendation contained in Dr. Wagner's report to continue the allowance for service connected disability and to waive future annual medical examinations and questionnaires at this time.

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**Name:** **Szela, Jeanette**  
**Type of Claim:** Service Connected

Staff's Recommendation:

Approve the recommendation contained in Dr. Wagner's report to grant Ms. Szela a service connected disability. Since Ms. Szela is over 55 years old, future annual medical examinations will not be required.

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