



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

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**Thursday, June 20, 2019**

Chair George Wood called the meeting to order at 2:03 p.m.

Trustees Present: Dale Amaral  
Ophelia Basgal  
Keith Carson (*Arrived During Closed Session*)  
Jaime Godfrey  
Henry Levy (*Arrived During Closed Session*)  
Elizabeth Rogers  
George Wood  
Nancy Reilly (*Alternate*)  
Darryl Walker (*Alternate*)

Trustees Excused: Tarrell Gamble  
Liz Koppenhaver

Staff Present: Margo Allen, Fiscal Services Officer  
Victoria Arruda, Human Resource Officer  
Angela Bradford, Executive Secretary  
Sandra Dueñas-Cuevas, Benefits Manager  
Kathy Foster, Assistant Chief Executive Officer  
Jessica Huffman, Benefits Manager  
Harsh Jadhav, Chief of Internal Audit  
Vijay Jagar, Retirement Chief Technology Officer, ACERA  
Kathy Mount, Chief Counsel  
David Nelsen, Chief Executive Officer  
Betty Tse, Chief Investment Officer

**PUBLIC INPUT**

None.

**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 OF BOARD and COMMITTEE MINUTES**

*May 15, 2019 Investment Committee Minutes*  
*May 16, 2019 Actuarial Committee Minutes*  
*May 16, 2019 Audit Committee Minutes*  
*May 16, 2019 Minutes of the Regular Board Meeting*  
*June 5, 2019 Operations Committee Minutes*  
*June 5, 2019 Retirees Committee Minutes*  
*June 5, 2019 Minutes of the Special Board Meeting*  
*June 12, 2019 Investment Committee Minutes*

**MISCELLANEOUS MATTERS:**

None.

**19-40**

It was moved by Elizabeth Rogers seconded by Jaime Godfrey, and approved by a vote of 5 yes (*Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions (*Dale Amaral and Darryl Walker recused themselves because one or more of the consent calendar items involved their employing Departments*):

**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**

*(Item(s) will be heard in Closed Executive Session)*

1. Sawhney, Satnam, Supervising Financial Services Specialist  
Alameda County Service: 13.62689 Years  
Probation Department, Application for Service Connected Disability

**COMMITTEE REPORTS, RECOMMENDATIONS AND MOTIONS**

*This month's Committee reports were presented in the following order:*

***Operations:***

Ophelia Basgal gave an oral report stating that the Operations Committee met on June 5, 2019, that there were no action items; however, the Committee was presented with updates on the following Information Items:

Operating Expenses as of April 30, 2019. Actual expenses were \$379K under budget. Budget overages noted were Professional Fees (\$38K over budget).

Status of disability cases processed by MMRO (Managed Medical Review Organization) and MMRO's performance to date. Trustees recommended that Staff consider expanding MMRO's role in ACERA's disability retirement process.

Status of the 2019 Board of Retirement Elections, which will be conducted for the following Seats: Third Member representing General Membership; Seventh Member and Seventh Alternate Member representing Safety Membership, Eighth Member and Eighth Alternate Member representing Retired Membership. The Board of Elections Timeline is as follows:

- Notice of Election begins on July 15<sup>th</sup> and ends on August 9<sup>th</sup>
- Nomination Period begins on August 12<sup>th</sup> and ends on September 9<sup>th</sup>
- Ballots will be mailed on November 14<sup>th</sup>
- Election Period begins on November 14<sup>th</sup> and ends on December 18<sup>th</sup>
- Deadline to return Ballots to the Registrar of Voters Office is December 18<sup>th</sup> at 5:00 p.m.
- Election results will be announced at the December 19<sup>th</sup> Board Meeting.

Minutes of the meeting were presented to the Board for adoption on the consent calendar at today's Board meeting.

***Retirees:***

Nancy Reilly gave an oral report stating that the Retirees Committee met on June 5, 2019 and that the Committee was presented with, reviewed information for and/or discussed the transfer of \$6,899,139 from the Supplemental Retiree Benefit Reserve (SRBR) account to the County Advance Reserve to be amortized over 20 years as the Implicit Subsidy payment for Plan Year 2018.

**19-41**

**It was moved by Nancy Reilly and seconded by Dale Amaral to authorize Staff to transfer \$6,899,139 from the Supplemental Retiree Benefit Reserve account to the County Advance Reserve to be amortized over 20 years as the Implicit Subsidy payment for Plan Year 2018. The motion carried 6 yes (*Amaral, Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions.**

Trustee Reilly further reported that the Committee was presented with, reviewed information for and/or discussed the Statement of Intent regarding the continuance of the Implicit Subsidy Program for health Plan Year 2020.

**19-42**

**It was moved by Nancy Reilly and seconded by Dale Amaral to adopt a Statement of Intent to continue the Implicit Subsidy Program for health Plan Year 2020, following a determination by ACERA at the end of Plan Year 2020 that the amount is not greater than the actual retiree Implicit Subsidy. The motion carried 6 yes (*Amaral, Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions.**

The Committee reviewed, was presented with and/or discussed the following Information Items: **1)** Health Care Inflation/Trends; **2)** Projected Benefit Costs Funded through the Supplemental Retiree Benefit Reserve (SRBR); **3)** Monthly Medical Allowance for 2020; **4)** 2019 Medical Plans Update/Renewal Requests of ACERA/County of Alameda; **5)** Annual Health Card Planning Meeting with Retiree Groups; **6)** Health Reimbursement Arrangement Account Balances and Reimbursements; **7)** Plans for Open Enrollment and Retiree Health and Wellness Fair; and **8)** Miscellaneous Updates.

Minutes of the meeting were presented to the Board for adoption on the consent calendar at today's Board meeting.

***Investment:***

Elizabeth Rogers gave an oral report stating that the Investment Committee met on June 12, 2019 and was presented with, reviewed information for and/or discussed an up to \$33 million Investment in Altas Partners Holdings II (Altas Partners) as part of ACERA's Private Equity Portfolio – Buyouts. Trustee Rogers reported that the founder of Altas Partners outlined the firm's history and culture. It was noted that Altas Partners' strategy is much different than other Buyout firms, as Altas only makes one or two investments per year and have a flexible holding period that can be much longer than other Buyout companies. Mr. Sheiner (founder of Altas Partners) discussed Altas' general investment strategy and process as well as the specific investment opportunity set for Altas Partners Holdings II.

**19-43**

**It was moved by Elizabeth Rogers and seconded by Dale Amaral that the Board approve an up to \$33 million Investment in Altas Partners Holdings II as part of ACERA's Private Equity Portfolio – Buyouts, pending completion of legal and investment due diligence, background investigations, and successful contract negotiations. The motion carried 6 yes (*Amaral, Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions.**

The Committee reviewed, was presented with and/or discussed the following Information Items: *1)* Status of Pzena Investment Management, LLC (Traditional Manager – Large Cap Value), which is a deep value, long-term investment manager. It was noted that although Pzena was in compliance with ACERA's reporting requirements, Pzena's ongoing underperformance was relatively lower than its account benchmark (Russell 1000 Value) by 1.08%. It was further noted that Pzena's 5-year net return was 6.64%. The Committee will continue to observe Pzena's performance and will discuss possible options regarding this investment with respect to ACERA's other investments in U.S Equities.

Other Information Items discussed were: *2)* Semiannual Performance Review for the Period Ending March 31, 2019 – Equities and Fixed Income; *3)* Semiannual Performance Review for the Period Ending March 31, 2019 – Absolute Return; *4)* Semiannual Performance Review for the Period Ending December 31, 2018 – Private Equity; *5)* Semiannual Performance Review for the Period Ending December 31, 2018 – Real Assets; and *6)* Semiannual Performance Review for the Period Ending March 31, 2019 – Real Estate.

Minutes of the meeting were presented to the Board for adoption on the consent calendar at today's Board meeting.

***Audit:***

George Wood gave an oral report stating that the Audit Committee met today and was presented with, reviewed information for and/or discussed ACERA's audited Schedules of Employer Allocations and Schedules of Pension Amounts by Employer with Related Notes, based on the Addendum to GASB Statement No. 67 Valuation as of December 31, 2018.

**19-44**

**It was moved by George Wood and seconded by Dale Amaral that the Board adopt the audited Schedules of Employer Allocations and Schedules of Pension Amounts by Employer with Related Notes, based on the Addendum to GASB Statement No. 67 Valuation as of December 31, 2018. The motion carried 6 yes (*Amaral, Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions.**

Trustee Wood further reported that the Committee was presented with, reviewed information for and/or discussed ACERA's audited Schedules of Employer OPEB Allocations and Schedules of OPEB Amounts by Employer with Related Notes, based on the Addendum to GASB Statement No. 74 Valuation as of December 31, 2018.

**19-45**

**It was moved by George Wood and seconded by Elizabeth Rogers that the Board adopt the audited Schedules of Employer OPEB Allocations and Schedules of OPEB Amounts by Employer with Related Notes, based on the Addendum to GASB Statement No. 74 Valuation as of December 31, 2018. The motion carried 6 yes (*Amaral, Basgal, Godfrey, Reilly, Rogers, Wood*), 0 no, and 0 abstentions.**

The Committee reviewed, was presented with and/or discussed the following Information Items: **1)** GASB Statement No. 68 Actuarial Valuation based on December 31, 2018, Measurement Date for Employer Reporting as of June 30, 2019; **2)** GASB Statement No. 75 Actuarial Valuation and Review of the Benefits Provided by the Supplemental Retiree Benefits Reserve Other Postemployment Benefits (OPEB) based on December 31, 2018, Measurement Date for Employer Reporting as of June 30, 2019; **3)** Progress report on the Internal Audit Plan; and **4)** Review of completed audits.

Minutes of the meeting will be presented to the Board for adoption on the consent calendar at the July 18, 2019 Board meeting.

**NEW BUSINESS:**

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

Mr. Nelsen presented his June 20, 2019, written CEO Report which provided an update on the following items: **1)** Senior Manager Recruitment; **2)** Committee/Board Action Items; and **3)** Conference/Event Schedule: Mr. Nelsen is scheduled to attend the CALAPRS Administrators' Round Table on Friday, June 21, 2019.

Due to ACERA stakeholders' concerns regarding issues surrounding customer service at ACERA, Mr. Nelsen provided an update on improvements Staff have made to expedite processes in three primary areas, they are:

- Disability Retirement Application Process. Staff has decreased the processing time of disability retirement applications from a 308 day average in 2016/2017 turn-around-time, to a 94 day average turn-around-time in 2018/2019.

- **Service Retirement Application Process.** Eighty-Seven percent (87%) of retirees in 2019 are receiving a final (full) 100% benefit payment with their first check. Staff is currently processing the backlog of the remaining retirees' (who only received an 80% benefit) applications to ensure they receive the 100% benefit payment in a timely manner.
- **Staff's Response Time to Members' Service Purchase Requests.** As of February 2019, ACERA had approximately 365 outstanding member Service Requests and the average time it took to process these requests was approximately 145 days. Currently, Staff processing time is approximately 20 days, and of the 365 backlogged Member Service Purchase Requests, Staff has processed over 177.

Due to the implementation of the LEAN Process Improvement Plan, Project Teams were established that worked on and significantly improved several processes. Specifically, the three aforementioned primary areas. It was noted that Staff distributed a customer service survey to 300 retirees to measure ACERA Staff's performance. Seventy survey responses were received and of those 70, 91% of retirees felt that ACERA Staff had met or exceeded their expectations. Mr. Nelsen reported that although ACERA Benefits Staff did not increase, Staff was still able to work on improving the aforementioned processes while working on their day-to-day assignments, in spite of job vacancies, and while training temporary Staff to assist with the Pension Administration System Project. Trustees and Staff expressed their appreciation to the LEAN Project Teams and to Assistant Chief Executive Officer Kathy Foster and Benefits Managers Sandra Dueñas-Cuevas and Jessica Huffman for implementing the process improvements.

### **CONFERENCE/ORAL REPORTS**

None.

### **ANNOUNCEMENTS**

George Wood announced that he will resign as ACERA's Board Chair at the end of today's Board meeting due to his ethical concerns related to the decision making process by Administrative Leadership at ACERA to conduct a lay-off. However, Trustee Wood will remain on the Board as member. As a result of Trustee Wood's resignation, First Vice-Chair Henry Levy will become the Board Chair and Second Vice-Chair Elizabeth Rogers will become First Vice-Chair. The Board will conduct an election for a Second Vice-Chair at the July 18, 2019 Board meeting.

**BOARD INPUT**

None.

**CLOSED SESSION**

Personnel Matter pursuant to Government Code Section 54957 & 88 Ops. Cal. Atty. Gen. 16 – Application of Satnam Sawhney for Disability Retirement – Alameda County Probation Department.

**REPORT ON ACTION TAKEN IN CLOSED SESSION**

The Board reconvened into Open Session and Chair George Wood announced that the Board took the following action:

**19-46**

**It was moved by Ophelia Basgal and seconded by Jaime Godfrey that the Board overrule applicant Satnam Sawhney’s evidentiary objections to the Hearing Officer’s Proposed Findings of Fact and Recommended Decision. The motion carried 7 yes (*Amaral, Basgal, Carson, Godfrey, Reilly, Rogers, Wood*), 0 no, and 1 abstention (*Levy*).**

**19-47**

**It was moved by Nancy Reilly and seconded by Ophelia Basgal that the Board approve and adopt the Hearing Officer’s Proposed Findings of Fact and Recommended Decision denying applicant Satnam Sawhney’s service-connected disability retirement application. The motion carried 7 yes (*Amaral, Basgal, Carson, Godfrey, Reilly, Rogers, Wood*), 0 no, and 1 abstention (*Levy*).**

**ADJOURNMENT**

The meeting adjourned at approximately 2:50 p.m.

Respectfully Submitted,



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David Nelsen  
Chief Executive Officer

7/18/19

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Date Adopted



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**APPENDIX A  
APPLICATION FOR SERVICE RETIREMENT**

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AHMED, Aida S.  
Effective: 12/29/2018  
Alameda Health System

AKACSOS, Stephen P.  
Effective: 3/23/2019  
Sheriff's Office

ATIENZA, Venancio M.  
Effective: 3/30/2019  
Public Works Agency

BACKERS-HOYLE, Angela C.  
Effective: 3/30/2019  
District Attorney

BALOLONG, Rosalind R.  
Effective: 9/22/2018  
Alameda Health System

BERHANU, Engedaw L.  
Effective: 3/30/2019  
Health Care Services Agency

BOWLER, Leona M.  
Effective: 4/20/2019  
Social Services Agency

BRADFORD, Mark H.  
Effective: 3/30/2019  
Public Works Agency

BROOKS, Michele B.  
Effective: 3/27/2019  
Alameda Health System

BRYAN, Keith G.  
Effective: 3/30/2019  
Sheriff's Office

CASAREZ, Sylvia  
Effective: 3/30/2019  
Superior Courts

CHANG, Teresa T.  
Effective: 3/31/2019  
Social Services Agency

CHAVEZ, Joseph A.  
Effective: 2/28/2019  
District Attorney

CHOW, Jose  
Effective: 3/23/2019  
Alameda Health System

COBER, Frederic A.  
Effective: 3/30/2019  
Superior Courts

COGMON, Kodryck B.  
Effective: 3/24/2019  
Probation

CRUZ, Diana D.  
Effective: 3/30/2019  
Health Care Services Agency

CRUZ, Eduardo  
Effective: 3/30/2019  
Social Services Agency

DALTON, Cynthia A.  
Effective: 3/30/2019  
Sheriff's Office

DAVIS, William L.  
Effective: 4/10/2019  
Social Services Agency

DE LEON, Emerlita A.  
Effective: 3/30/2019  
Social Services Agency

DEREVIN, Marina  
Effective: 3/23/2019  
Alameda Health System

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**APPENDIX A**  
**APPLICATION FOR SERVICE RETIREMENT**

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DO, Chi L.  
Effective: 3/23/2019  
Alameda Health System

GAYFIELD, Yvette N.  
Effective: 3/13/2019  
Probation

DORIA, Celso  
Effective: 3/31/2019  
Alameda Health System

GERLEMAN, Barbara M.  
Effective: 3/30/2019  
Sheriff's Office

EARL, Connie L.  
Effective: 3/30/2019  
Social Services Agency

GOMEZ, Juan L.  
Effective: 3/30/2019  
Sheriff's Office

EASTMAN, El Roy  
Effective: 5/3/2019  
Probation

GRAY, David K.  
Effective: 3/30/2019  
Health Care Services Agency

FERGERSON, Lee A.  
Effective: 3/30/2019  
Board of Supervisors

HAGOS, Ogbai G.  
Effective: 3/23/2019  
Alameda Health System

FRANCISCO, Cristeta S.  
Effective: 3/23/2019  
Registrar of Voters

HAWTHORNE, Julie  
Effective: 3/23/2019  
Health Care Services Agency

FUENTES, Beverly B.  
Effective: 3/28/2019  
Human Resource Services

HAYES, Melzena A.  
Effective: 3/30/2019  
Superior Courts

FUNG, Julie Suk-Mei  
Effective: 3/30/2019  
Health Care Services Agency

HUNT, Patricia L.  
Effective: 3/30/2019  
Community Development Agency

GANDARA-SWINBANK, Maureen  
Effective: 3/30/2019  
LARPD

IRVING, Anne E.  
Effective: 4/3/2019  
Health Care Services Agency-Def

GARABILES, Mila B.  
Effective: 4/13/2019  
Health Care Services Agency

JACKSON, Benita R.  
Effective: 3/27/2019  
Social Services Agency

GARCIA, Nida B.  
Effective: 4/1/2019  
Alameda Health System

JEW, Beverly  
Effective: 3/30/2019  
Alameda Health System

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**APPENDIX A  
APPLICATION FOR SERVICE RETIREMENT**

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JOHNSON, Deborah A.  
Effective: 3/28/2019  
Superior Court-Def

LINN, James B.  
Effective: 3/24/2019  
Sheriff's Office

JOHNSON, Rosaline  
Effective: 3/30/2019  
Auditor-Controller

LOUIE, Darien G.  
Effective: 3/30/2019  
County Administrator

JONES, Ken B.  
Effective: 3/7/2019  
Health Care Services Agency

MACKENZIE, Marguerite T.  
Effective: 3/30/2019  
Health Care Services Agency

JORDAN, Delores  
Effective: 1/14/2016  
Alameda Health System

MADDOCK, Liliana F.  
Effective: 3/30/2019  
District Attorney

KERR, Mary R.  
Effective: 3/25/2017  
General Services Agency

MANN, James C.  
Effective: 3/30/2019  
Public Defender

KLIMIST, Kyree N.  
Effective: 1/27/2019  
Health Care Services Agency- Def

MARTINES, Carolina A.  
Effective: 3/31/2019  
Alameda Health System

KLINE, Maurine  
Effective: 3/30/2019  
LARPD

MARTINEZ, Julie M.  
Effective: 12/16/2017  
Social Services Agency

KNITTEL, Cheryl F.  
Effective: 3/30/2019  
Superior Courts

MATTA, Juan A.  
Effective: 3/30/2019  
Treasurer-Tax Collector

LANDRY, Jerrie D.  
Effective: 3/30/2019  
Social Services Agency

MC MAHON, Donald B.  
Effective: 3/11/2017  
Superior Courts

LEE, Alfred  
Effective: 3/23/2019  
Social Services Agency

MC NAIRY, Malcolm C.  
Effective: 10/28/2017  
Alameda Health System

LINDSEY, Joann P.  
Effective: 4/1/2019  
Alameda Health System

MCGREGOR, Carole B.  
Effective: 3/29/2019  
Health Care Services Agency

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**APPENDIX A  
APPLICATION FOR SERVICE RETIREMENT**

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MCGUIRE, Louise A.  
Effective: 3/28/2019  
Social Services Agency-Def

NY, Monida E.  
Effective: 3/30/2019  
Social Services Agency

MCMICHAEL, Curtis A  
Effective: 4/1/2017  
Health Care Services Agency

O'NEAL, Beverly I.  
Effective: 3/30/2019  
Superior Courts

MEANS, Angelo  
Effective: 3/21/2019  
Probation

OWENS, Janet I.  
Effective: 3/23/2019  
Superior Courts

MICHAEL, Azeb M.  
Effective: 3/23/2019  
Social Services Agency

PEARSON, Debra O.  
Effective: 3/30/2019  
Superior Courts

MORD, Steven C  
Effective: 3/8/2019  
Assessor

PENA, Elena V.  
Effective: 3/30/2019  
Superior Courts

MORTENSEN, Jacqueline D.  
Effective: 3/30/2019  
Health Care Services Agency

PINKNEY, Perri R.  
Effective: 3/30/2019  
Superior Courts

NARBY, Bonnie L.  
Effective: 3/30/2019  
Public Defender

POLITZER, Lore A.  
Effective: 3/30/2019  
Social Services Agency

NAVARRO, Andrea B.  
Effective: 12/11/2018  
Superior Courts

RACKMIL, Jeffrey  
Effective: 3/30/2019  
Health Care Services Agency

NAWABI, Laila  
Effective: 3/31/2019  
Alameda Health System

RARAS, Rodolfo R.  
Effective: 3/30/2019  
Community Development Agency

NELSON, Suzanne U.  
Effective: 2/28/2019  
Non-member

REAL, Fred R.  
Effective: 4/1/2017  
Public Works Agency

NOBLES, Mark D.  
Effective: 3/21/2019  
Superior Court

REEDY, Joseph D.  
Effective: 4/14/2017  
Health Care Services Agency

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**APPENDIX A  
APPLICATION FOR SERVICE RETIREMENT**

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ROQUEMORE, Evelyn L.  
Effective: 3/30/2019  
Probation

SHEARD, Shandra A.  
Effective: 8/25/2018  
First 5

ROSS, Mary R.  
Effective: 4/20/2019  
Social Services Agency

SHOULDICE, John P.  
Effective: 3/30/2019  
Public Works Agency

ROWDEN, Lolita S.  
Effective: 3/1/2019  
Probation

SIEGEL, Shelley M.  
Effective: 3/30/2019  
Social Services Agency

RUSSAW-MORRIS, Rosalyn  
Effective: 12/16/2017  
Superior Courts

SILVA, Dolores J.  
Effective: 3/23/2019  
Superior Courts

SAMBILE, Mario M.  
Effective: 3/30/2019  
Health Care Services Agency

STARK, Jeffrey P.  
Effective: 3/30/2019  
District Attorney Office

SANCHEZ, Cheryl  
Effective: 1/27/2018  
Alameda Health System

STROUD-BLAGG, Marla-Lee  
Effective: 11/22/2018  
Health Care Services Agency

SANTOS, Maricor S  
Effective: 4/13/2019  
Alameda Health System

SUNG, Sui-Kwong  
Effective: 3/29/2019  
Health Care Services Agency

SAWREY-KUBICEK, Phillip K.  
Effective: 3/30/2019  
Community Development Agency

SYMENS-BUCHER, Terry M.  
Effective: 3/23/2019  
Child Support Services-Def

SECOR, Stephen E.  
Effective: 3/30/2019  
Information Technology Department

TRAYWICK, Clarence A.  
Effective: 3/30/2019  
Superior Courts

SEQUEIRA, Marianela F.  
Effective: 3/30/2019  
Superior Courts

TYRRELL, Sean E.  
Effective: 3/22/2019  
Sheriff's Office

SHAUF, Rebecca T.  
Effective: 3/30/2019  
Social Services Agency

WOGSBERG, Philip H.  
Effective: 3/30/2019  
ACERA

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**APPENDIX A**  
**APPLICATION FOR SERVICE RETIREMENT**

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WONG, Bin  
Effective: 3/30/2019  
Social Services Agency

WOOLLEY, Sharon  
Effective: 6/4/2016  
Auditor-Controller

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**APPENDIX B**  
**APPLICATION FOR DEFERRED RETIREMENT**

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BEAUCHAMPS, Isabelle  
General Services Agency  
Effective Date: 4/25/2019

RODRIGUEZ, Vanessa J.  
Health Care Services Agency  
Effective: 2/11/2019

BRIGGS, Vitaline  
Alameda Health System  
Effective: 4/5/2019

ROY, Maria C.  
Alameda Health System  
Effective: 3/1/2019

CESENA, Jacob V.  
Sheriff's Office  
Effective: 1/11/2019

SANTANA, Cristina  
Health Care Services Agency  
Effective: 3/22/2019

CHAN, Wai Kan  
Alameda Health System  
Effective: 3/15/2019

SCHWABL, Katherine Z.  
Alameda Health System  
Effective: 3/1/2019

COLE, Donna M.  
Alameda Health System  
Effective: 3/29/2019

STARR, Thelma M.  
Social Services Agency  
Effective: 2/5/2019

CONCEPCION, Dean M. S.  
Sheriff's Office  
Effective: 5/18/2019

SZUTU, Katie R.  
Alameda Health System  
Effective: 4/5/2019

FERREIRA, Jorge H.  
Sheriff's Office  
Effective: 4/4/2019

TITUS, Meashline F.  
Social Services Agency  
Effective Date: 4/19/2019

MORIARTY, Patrick D.  
District Attorney  
Effective: 3/1/2019

VERNON, Tamani J.  
Sheriff's Office  
Effective: 4/3/2019

QUINN, Christine L.  
Sheriff's Office  
Effective: 3/1/2019

YAMIN, Raymond A.  
Alameda Health System  
Effective: 5/3/2019

YBARRA, Yvette R.  
Sheriff's Office  
Effective: 4/19/2019

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

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ABIYEVA, Madina  
Probation  
Effective: 4/6/2019

ROMO, Melissa D.  
Alameda Health System  
Effective: 3/19/2019

BARAJAS, Marlene  
Probation  
Effective: 4/13/2019

SAELEE, Meuy C.  
Social Services Agency  
Effective: 4/5/2019

BARRETT, Grant  
Superior Court  
Effective: 3/29/2019

SANDHAR, Jasdeep K.  
Probation  
Effective: 2/11/2019

CHOKSHI, Ruchi A.  
Social Services Agency  
Effective: 3/11/2019

SAQUETON, Joseph Z.  
General Services Agency  
Effective: 2/22/2019

CLOUD-HOLLOWAY, Rachel L.  
Health Care Services Agency  
Effective: 4/19/2019

SAVOY, Lavelle J.  
Social Services Agency  
Effective: 3/25/2019

CRANDELL, Ashley M.  
Sheriff's Office  
Effective: 4/10/2019

SHELTON, Juana L.  
Alameda Health System  
Effective Date: 4/2/2019

DIAMOND, Lindsey R.  
Alameda Health System  
Effective: 4/3/2019

SMITH, NICHELLE L.  
Alameda Health System  
Effective: 3/16/2019

FRANCOIS, Cassandra  
Superior Court  
Effective: 3/20/2019

SNOWDEN, Ericka D.  
Social Services Agency  
Effective: 3/29/2019

HOM, Donna D.  
Information Technology  
Effective: 5/3/2019

STEINBERG, Michelle  
Superior Court  
Effective: 5/3/2019

ROMO, Blanca R.  
District Attorney  
Effective: 4/19/2019

TRUJILLO, Nayely  
Alameda Health System  
Effective: 3/29/2019

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

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WITEK, Bernardetta  
Alameda Health System  
Effective: 3/27/2019

ZANARDI, Nicole M  
Public Defender  
Effective: 4/12/2019

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**APPENDIX D**  
**LIST OF DECEASED MEMBERS**

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Brosnan, Sarah  
Non-Mbr Survivor of Edward Brosnan  
5/8/2019

Kilgore, Kevin  
Sheriff's Department  
5/20/2019

Dennis, Albert  
Probation  
5/1/2019

Knight Jr., Harvey  
General Services Agency  
5/3/2019

Eikeland, Karen  
Non-Mbr Survivor of Mary Eikeland  
5/3/2019

Kohler, Manfred  
Sheriff's Department  
5/28/2019

Endres, Jean  
Treasurer - Tax Collector  
5/16/2019

Kuendig, Aida  
Non-Mbr Survivor of Anton Kuendig  
4/7/2019

Garcia, Gladys  
Alameda Health System  
4/3/2019

McMath, Marlana  
Public Defender  
5/4/2019

Harris, Roderick  
Social Services Agency  
4/15/2019

Ngo, Cam  
Non-Mbr Survivor of Viet Tran  
5/20/2019

Herspring, Dave  
Sheriff's Department  
5/22/2019

Oniola, Violeta  
Health Care Services Agency  
4/7/2019

Higby, Geraldine  
Non-Mbr Survivor of Russell Higby  
5/15/2019

Robinson, Zephaniah  
Sheriff's Department  
4/22/2019

Vereeke, Shirley  
Probation  
5/26/2019



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

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**Name:** Bucher, Samantha  
**Type of Claim:** Annual Review for SCD (Granted on 12/17/15)

Staff's Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor's report to continue the allowance for Ms. Bucher's service connected disability and to waive future annual medical examinations and questionnaires.

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**Name:** Burgess, Thomas  
**Type of Claim:** Service Connected

Staff's Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor's report, including but not limited to, granting Mr. Burgess's application for a service connected disability, and waiving future annual medical examinations and questionnaires.

Based on the Medical Advisor's and Staff's review and determination of Mr. Burgess's ability to determine the permanency of his incapacity, to deny Mr. Burgess's request for an earlier effective date.

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**Name:** Castillo, Ruth  
**Type of Claim:** Service Connected

Staff's Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor's report to continue the allowance for Ms. Castillo's service connected disability and to require future annual medical examinations and questionnaires.

Based on the Medical Advisor's and Staff's review and determination of Ms. Castillo's ability to determine the permanency of his incapacity, to grant Ms. Castillo's request for an earlier effective date.

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

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**Name:** Morra, Leslie  
**Type of Claim:** Non-Service Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Ms. Morra’s application for a non-service connected disability, and waiving future annual medical examinations and questionnaires.

Approve Ms. Morra’s request to pursue a service-connected disability retirement.

Based on the Medical Advisor’s and Staff’s review and determination of Ms. Morra’s ability to determine the permanency of her incapacity, to grant Ms. Morra’s request for an earlier effective date.

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**Name:** Thoms, Derek  
**Type of Claim:** Annual Review for SCD (Granted on 12/21/17)

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report to continue the allowance for Mr. Thom’s service connected disability and to require future annual medical examinations and questionnaires.

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