



# Board of Retirement Regular Meeting

## Sacramento County Employees' Retirement System

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### Agenda Item 15

**MEETING DATE:** January 16, 2019

**SUBJECT:** Ratification of Retirement Applications Policy

**SUBMITTED FOR:**  Consent  **Deliberation and Action**  **Receive and File**

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#### **RECOMMENDATION**

Staff recommends that the Board approve the Ratification of Retirement Applications Policy, and ratify the report of Finalized Retirement Applications for December 2018.

#### **PURPOSE**

This item does not specifically support the 2018-19 Strategic Management Plan, but contributes to the Board's effective oversight of the retirement system and ensures consistent application of retirement law.

#### **DISCUSSION**

This policy delegates authority to the Chief Executive Officer, or designate, to accept and process service retirement applications, approve effective retirement dates, and pay members their retirement benefits consistent with the County Employees Retirement Law of 1937 and the Public Employees' Pension Reform Act of 2013.

This policy also directs the Chief Executive Officer to provide a monthly written report of retiring members to the Board for ratification. Finally, this agenda item also includes the first report for ratification, related to service retirement applications processed in December 2018. Future reports will be placed on the consent agenda.

Under statute, the Board of Retirement has the duty to retire members who are qualified for retirement. Government Code section 31670 states: *Retirement of a member who has met the requirements for age and service shall be made by the board pursuant to this article or pursuant to the California Public Employees' Pension Reform Act of 2013, whichever is applicable.*

However, under longstanding practice, SCERS staff have processed and approved service retirement applications, and the SCERS Board has been provided a monthly information report of retiring members.

In the recent Court of Appeal case, *Wilmot v. Contra Costa County Employees' Retirement Association*, 1<sup>st</sup> DCA Case No. A152100, December 3, 2018, which dealt with felony forfeiture, the question was raised as to when a member officially retires. The court, citing section 31670, held that a member was not retired until the Board formally approved the member's retirement application.

Therefore, consistent with the statute, applicable case law, and best practice, staff is recommending that the SCERS Board approve this policy. A survey of other 1937 Act systems found a number of approaches that retirement boards use to approve, ratify, or review service retirement applications. By formally delegating the authority to approve service retirements to the Chief Executive Officer, and subsequently ratifying those retirements, this policy will meet the requirement of section 31670 and will enable members to retire in a timely manner.

Disability retirement applications will continue to be presented to the Board for individual consideration.

### **ATTACHMENTS**

- Ratification of Retirement Applications Policy
- Finalized Retirement Applications for December 2018

Prepared by:

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Andrew L. Kjeldgaard  
Interim General Counsel

Reviewed by:

/S/

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Eric Stern  
Chief Executive Officer



# RATIFICATION OF RETIREMENT APPLICATIONS POLICY

<b>Revision Date:</b>	<b>January 16, 2019</b>	<b>Policy Number:</b>	<b>028</b>
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## PURPOSE

The purpose of this policy is to authorize the SCERS Chief Executive Officer, or designate, to approve service retirement applications and to ratify these actions at the monthly Board meetings.

## POLICY

The Chief Executive Officer, or designate, is delegated authority to accept and process service retirement applications, to approve effective retirement dates, and to pay members retirement benefits consistent with the County Employees Retirement Law of 1937 and the Public Employees' Pension Reform Act of 2013.

The Board of Retirement will ratify member retirements at its monthly Board Meetings.

## APPLICATION

The Chief Executive Officer, or designate, shall ensure applications of members who are qualified for service retirement are timely processed and that retiring members are added to retirement payroll as soon as possible.

The Chief Benefits Officer shall provide a monthly report of finalized service retirement applications to the Chief Executive Officer for ratification by the Board of Retirement. The ratification of member retirements will be placed on the Board's Consent Calendar.

## BACKGROUND

The Board of Retirement has the duty to retire members who are qualified for retirement. Government Code section 31670 states: *Retirement of a member who has met the requirements for age and service shall be made by the board pursuant to this article or pursuant to the California Public Employees' Pension Reform Act of 2013, whichever is applicable.*

Members who qualify for retirement may retire at any time. In order not to delay member retirements, the Board will ratify service retirements approved by the Chief Executive Officer at their monthly Board meetings.

**RESPONSIBILITIES**

Executive Owner: Chief Benefits Officer

**POLICY HISTORY**

<b>Date</b>	<b>Description</b>
1-16-2019	Staff presented policy for Board approval.

Sacramento County Employees' Retirement System -  
 Finalized Retirement Applications for 12/1/2018 to 12/31/2018

Report Generated on: 1/7/2019

Last Name	First Name	Retire Date	Entered In Payroll	Department	Current Plan	Service Credit (Yrs.)
Alder	Gena	10/24/2018	12/04/2018	Probation	Miscellaneous Tier III	17.8
Alesci	Terri	12/04/2018	12/31/2018	Health Services	Miscellaneous Tier III	36.5
Arakawa	Akira	12/01/2018	12/19/2018	Sheriff	Miscellaneous Tier III	24
Berkenpas	Sharon	10/13/2018	12/03/2018	Human Assistance	Miscellaneous Tier III	10.3
Bernardino	Paul	11/10/2018	12/28/2018	District Attorney	Miscellaneous Tier III	6.5
Blank	Dean	11/03/2018	12/19/2018	Transportation	Miscellaneous Tier III	29.2
Bowens	Mona	11/03/2018	12/20/2018	Human Assistance	Miscellaneous Tier I	43.5
Brennan	Joseph	11/25/2018	12/28/2018	Airports	Miscellaneous Tier III	11.5
Carson	Lance	10/12/2018	12/03/2018	Sheriff	Safety Tier II	20.6
Correa	Amber	11/02/2018	12/13/2018	Probation	Miscellaneous Tier III	19.1
Cristoni	Robert	11/30/2018	12/31/2018	Sac Area Sewer District	Miscellaneous Tier III	20.9
Crosby	Martin	12/04/2018	12/31/2018	Sheriff	Safety Tier II	20.3
Culbert, Jr.	John	12/08/2018	12/21/2018	Technology	Miscellaneous Tier III	18
Cully	Raylene	11/17/2018	12/19/2018	Sheriff	Safety Tier II	32.1
Deloney	Gladys	11/17/2018	12/18/2018	Human Assistance	Miscellaneous Tier III	34.4
Diaz	Elsa	11/03/2018	12/19/2018	Human Assistance	Miscellaneous Tier III	30.1
Elander	Scott	11/17/2018	12/18/2018	General Services	Miscellaneous Tier III	12.5
Ferry	Steven	12/04/2018	12/31/2018	Sheriff	Safety Tier I	28.9
Gage	Rebecca	10/30/2018	12/13/2018	Sheriff	Safety Tier I	23.3
Halk	Christine	10/03/2018	12/06/2018	Sheriff	Miscellaneous Tier III	17.1
Hill	Phil	12/01/2018	12/31/2018	Development and Code Services	Miscellaneous Tier III	12.3
Holtz	Layne	10/18/2018	12/03/2018	Water Resources	Miscellaneous Tier III	16
Hrabak	Sherri	11/10/2018	12/28/2018	Sheriff	Miscellaneous Tier III	21.1
Hudson	Elizabeth	10/13/2018	12/03/2018	Revenue Recovery	Miscellaneous Tier III	14.3
Ibarra	Vicki	11/24/2018	12/19/2018	Human Assistance	Miscellaneous Tier III	24.8
Jarvis	Richard Brent	12/02/2018	12/31/2018	Sheriff	Safety Tier I	23.9
Katsules	Lin	11/25/2018	12/28/2018	Sheriff	Miscellaneous Tier III	22.4
Kidd	Phyllis	12/04/2018	12/31/2018	Technology	Miscellaneous Tier III	30
King	Daniel	10/18/2018	12/04/2018	Sheriff	Miscellaneous Tier III	20.5
Konstantinidis	Manuel	10/28/2018	12/13/2018	Sheriff	Safety Tier II	16.8
Korsak	Vicki	11/20/2018	12/31/2018	Assessor	Miscellaneous Tier III	20.6
Kuns	Angela	11/17/2018	12/18/2018	Superior Court	Miscellaneous Tier III	11.4
Leon	David	11/25/2018	12/19/2018	Sheriff	Safety Tier II	19.9
Maynard	Lynn	10/10/2018	12/07/2018	Superior Court	Miscellaneous Tier III	4.3
McDowell	James	12/04/2018	12/31/2018	Assessor	Miscellaneous Tier V	4

Last Name	First Name	Retire Date	Entered In Payroll	Department	Current Plan	Service Credit (Yrs.)
Morden	Barbara	12/01/2018	12/20/2018	Superior Court	Miscellaneous Tier III	14.1
Muniz	Ernestina	11/03/2018	12/18/2018	Superior Court	Miscellaneous Tier III	26.9
Nielsen	Scott	11/29/2018	12/28/2018	Health Services	Miscellaneous Tier III	2
Page	Andrew	11/03/2018	12/19/2018	Sanitation District Agencies	Miscellaneous Tier III	19.2
Perez	Donovan	11/18/2018	12/13/2018	Probation	Safety Tier II	9.8
Rife	Daniel	11/24/2018	12/19/2018	General Services	Miscellaneous Tier III	20.6
Robinson	Stephan	12/01/2018	12/19/2018	Waste Management & Recycling	Miscellaneous Tier III	24.8
Satchwell	Gayle	12/01/2018	12/19/2018	Municipal Services Agency	Miscellaneous Tier III	15.8
Scott	Shannon	11/06/2018	12/28/2018	Sheriff	Safety Tier I	3
Slater	Susan	11/17/2018	12/18/2018	Child, Family and Adult Services	Miscellaneous Tier III	12
Smith	Gregory	11/03/2018	12/18/2018	Development and Code Services	Miscellaneous Tier III	28.1
Steele	David	10/27/2018	12/18/2018	Environmental Mgmt Dept	Miscellaneous Tier III	24
Stephens	Patricia	11/10/2018	12/21/2018	Health Services	Miscellaneous Tier III	12.4
Stewart	Robert	03/30/2018	12/07/2018	Sheriff	Safety Tier I	29.7
Taylor	Herminia	11/21/2018	12/28/2018	Child, Family and Adult Services	Miscellaneous Tier III	18.1
Veasey	Sona	11/01/2018	12/21/2018	Child Support Services	Miscellaneous Tier III	25.1
Walker	Nancy	11/03/2018	12/18/2018	Sac Area Sewer District	Miscellaneous Tier III	27.8
Werblun	Jeffery	09/24/2018	12/07/2018	Sheriff	Safety Tier II	4.9
White	Sharon	10/13/2018	12/13/2018	County Clerk Recorder	Miscellaneous Tier III	18.4
Winchell	Scott	11/10/2018	12/18/2018	Probation	Safety Tier II	28.5

Summary Data for Period:

Total Retirements: 55 Average Age at Retirement: 58 Yrs. Average Service: 19