

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, September 25, 2015
9:00 a.m.

MINUTES

PENSION ADMINISTRATION

MEMBERS PRESENT: Peter Stevens, Chairman; Frank Lord; Gene Goldman; Nicholas Triglia, Employee Representative; Adam Cloud, Secretary

STAFF PRESENT: Donna Parker, Plan Administrator; Rebecca Crowley, Assistant Plan Administrator; Lisa Silvestri, Assistant Corporation Counsel; Gary Draghi, Director of Investments; P. Wayne Moore, Assistant Director of Investments; Carmen Sierra, Assistant City Treasurer; J. Sean Antoine, Principal Administrative Analyst; Terry Williams, Senior Administrative Assistant; Chelsea Mott, Accountant

OTHERS PRESENT: Richard Pokorski, Employee Benefits; George Zoltowski, Management and Budget; Darrell Hill, Chief Operating Officer (COO); Felicita Cruz, City employee

Chairman Peter Stevens called the meeting to order at 9:30 a.m.

I. Minutes of the Meeting of July 24, 2015

There were no changes or corrections to the minutes as presented.

A motion was made, seconded and unanimously adopted to accept the minutes of the July 24, 2015 meeting.

II. Survivor Benefits

A motion was made, seconded and unanimously adopted to approve the following survivor benefits:

Gadson, James, survivor of the late Betty Gadson, member of the Municipal Employees' Retirement Fund (MERF) who died May 26, 2015 (Survivor benefits under the MERF; Emp. #S274534 / 980312) *

Effective Date: June 1, 2015
Annual Allowance: \$ 10,467.12
Monthly Allowance: 872.26

Leahy, Michael, survivor of the late Elizabeth Leahy, member of the Municipal Employees' Retirement Fund (MERF) who died August 8, 2015 (Survivor benefits under the MERF; Emp. #S435147 / 980316)

Effective Date: September 1, 2015
Annual Allowance: \$ 2,610.12
Monthly Allowance: 217.51

Luster, Cynthia, survivor of the late Melton Luster, member of the Municipal Employees' Retirement Fund (MERF) who died April 9, 2015 (Survivor benefits under the MERF; Emp. #990269 / 980314) *

Effective Date: May 1, 2015
Annual Allowance: \$ 766.44
Monthly Allowance: 63.87

Michaelis, Raymond, survivor of the late Ann Michaelis, member of the Board of Education Retirement Annuity Fund (BOE RAF) who died June 26, 2015 (Survivor benefits under the BOE RAF; Emp. #S515868 / 980313) *

Effective Date: July 1, 2015
Annual Allowance: \$ 3,550.44
Monthly Allowance: 295.87

II. Survivor Benefits (continued)

Reliford, Ulysses, survivor of the late Barbara Reliford, member of the Municipal Employees' Retirement Fund (MERF) who died August 27, 2015 (Survivor benefits under the MERF; Emp. #S372366 / 980315)

Effective Date:	September 1, 2015	
Annual Allowance:		\$ 13,504.08
Monthly Allowance:		1,125.34

* These benefits are being presented for ratification. The first payments were made in August 2015.

III. Regular Retirements

The Plan Administrator, Donna Parker, reported that there were 24 retirements during August and September. Chairman Stevens asked for additional detail regarding a specific retiree and the large difference between final base pay and final average salary. Employee Representative Nick Triglia responded that the retiree was a police officer and worked a lot of overtime. Commissioner Lord asked if there was priority regarding who gets overtime. Mr. Triglia stated that the lower ranks get first priority.

Secretary Adam Cloud asked Chief Operating Officer Darrell Hill the status of the staffing level and if there were any measures in place to counter large amounts of overtime like the retiree being discussed. Mr. Hill stated that the collectively bargained agreement spells out the overtime rules. Mr. Hill also noted that the overtime issue was not new and there had been discussions at the Council level for several years. With regard to staffing, Mr. Hill explained that the City was working on a plan but it would take several years to address and further noted that the City received approximately 150-200 applications for the newest cadet class that yielded 20 qualified candidates, of which 15 were expected to make it through the training process to become sworn officers. Secretary Cloud asked if a 10% yield was normal. Mr. Triglia replied that in the past the City had received many more applications and that the requirements since then had become more difficult.

Ms. Parker reported that the Pension Administration Unit had received a request for a retirement estimate and the pension staff noticed that the officer's base pay had decreased. Ms. Parker stated that the pension staff asked for confirmation of the pay decrease and in response received paperwork that showed the officer had requested a voluntary demotion in order to be eligible for more private duty jobs and to increase his pension eligible pay and retirement benefit. Ms. Parker noted that this request had been submitted through the proper channels and had been signed by the Chief of Police.

Chairman Stevens stated there was explicit decision making to create elevated levels of overtime. Secretary Cloud noted that this was a case of self-demotion to get more overtime to fatten a pension benefit and that the Pension Commission did not know how overtime was managed but did have to manage the liability associated with that overtime. Chairman Stevens added that it was hard to argue with hiring more officers with this overtime trend. Mr. Triglia noted that the overtime trend would likely continue over the next four years and would decline after 2019 because the 20 year contract expired at that time and officers hired after 1999 had a 25 year contract. Mr. Triglia added that the Commission would see some officers with large amounts of overtime trickle through but that most officers did not (or could not) work this level of overtime.

Chief Operating Officer Hill explained that overtime was managed in-line with the collectively bargained agreement and as with most things, when rules were known, there was an ability to work within the framework. Mr. Hill noted that the City had seen similar situations in the past, and while challenging, the overtime issue was not new. Mr. Hill concluded by stating that everyone (police union, Chief of Police, City Council, the administration and the Pension Commission) had a responsibility to work through the issue to ensure that decisions were in the best interest of the City.

Secretary Cloud stated that it was important for the Treasurer's Office and Pension Commission to be involved in union negotiations as the impact of implementation was not considered in negotiations. Chairman Stevens noted that even after negotiations were over, there was a targeted, blatant intent to drive numbers to where they were and could not believe the collective bargaining agreement was so restrictive that the City could not counteract. George Zoltowski from Management and Budget noted that the number of officers with pension eligible private duty pay was fixed and would decrease over time. Mr. Hill explained that the police and fire departments were unique compared to other city departments because these departments had an employee base that did not work every day and employees were called on a daily basis to fill in positions as needed and individuals had the right to say no to such overtime.

III. Regular Retirements (continued)

A motion was made, seconded and unanimously adopted to approve the following regular retirement benefits:

		<u>AMOUNT</u>		
<u>Albani, Daniel</u>				
Emp. # 940305 / 990711				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		32	0	0
Sick Exchange:		2	0	0
Grounds:	Service			
Effective Date:	July 13, 2015			
Average Salary:	Final Base Pay			\$ 93,745.25
Pension Allowed:	85.00 % less QDRO			72,996.24
Monthly Payment:				6,083.02

<u>Arcata, Mario</u>				
Emp. # 017710 / 990710				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		36	0	0
Sick Exchange:		2	0	0
Grounds:	Service			
Effective Date:	July 26, 2015			
Average Salary:	Final Base Pay			\$ 85,166.57
Pension Allowed:	85.00 %			72,391.56
Monthly Payment:				6,032.63

<u>Bajwa, Amrit</u>				
Emp. # 917689 / 990717				
Union: Local 82				
		Years	Months	Days
Term of Service (including Sick Exchange):		11	0	0
Sick Exchange:		0	0	0
Grounds:	Early			
Effective Date:	September 26, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 70,833.19
	Final Base Pay			70,333.00
Pension Allowed:				
Unreduced Pension:	27.50 %			\$ 19,479.12
Early Reduction Factor:	4.00 % for each year prior to age 60			16.00 %
Reduced Pension:				\$ 16,362.48
Monthly Payment:				1,363.54

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III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>Buckley, Brian</u>				
Emp. # 941687 / 990714				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		31	0	0
Sick Exchange:		6	0	0
Grounds:	Service			
Effective Date:	July 29, 2015			
Average Salary:	Final Base Pay			\$ 81,825.89
Pension Allowed:	85.00 %			69,552.00
Monthly Payment:				5,796.00
<u>Bustamante, Vidal</u>				
Emp. # 080560 / 990713				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange):		36	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	August 3, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 138,304.06
	Final Base Pay			74,763.00
Pension Allowed:	80.00 %			110,643.24
Monthly Payment:				9,220.27
<u>Chandler, DL</u>				
Emp. # 945619 / 990709				
Union: HMEA				
		Years	Months	Days
Term of Service (including Sick Exchange):		6	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	September 18, 2015			
Average Salary:	Highest 2 out of last 5 years			\$ 79,554.23
	Final Base Pay			80,008.00
Pension Allowed:	12.00 %			9,546.48
Monthly Payment:				795.54

III. Regular Retirements (continued)

		<u>AMOUNT</u>		
		Years	Months	Days
<u>DeJesus, Barbara *</u>				
Emp. # 903752 / 990707				
Union: Local 1018C				
Term of Service (including Sick Exchange):		26	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	July 11, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 51,235.37
	Final Base Pay			48,253.00
Pension Allowed:	52.00 %			26,642.40
Monthly Payment:				2,220.20

<u>Donza, Thomas *</u>				
Emp. # 209643 / 990703				
Union: Local 760				
Term of Service (including Sick Exchange):		37	0	0
Sick Exchange:		2	0	0
Grounds:	Service			
Effective Date:	July 14, 2015			
Average Salary:	Final Base Pay			\$ 88,693.49
Pension Allowed:	85.00 %			75,389.52
Monthly Payment:				6,282.46

<u>Foster, Edward</u>				
Emp. # 903100 / 990716				
Union: HPU				
Term of Service (including Sick Exchange):		24	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	August 19, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 121,670.58
	Final Base Pay			71,480.00
Pension Allowed:	63.00%			76,652.52
Monthly Payment:				6,387.71

III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>Gaffney, Michael *</u>				
Emp. # 945898 / 990696				
Union: Non Union				
		Years	Months	Days
Term of Service (including Sick Exchange):		5	0	0
Sick Exchange:		0	0	0
Grounds:	Vested Early			
Effective Date:	July 23, 2015			
Termination Date:	September 12, 2014			
Average Salary:	Highest 2 out of last 5 years			\$ 55,575.06
	Final Base Pay			55,432.00
Pension Allowed:				
Unreduced Pension:	12.50 %			\$ 6,946.92
Early Reduction Factor:	4.00 % for each year prior to age 60			16.00 %
Reduced Pension:				\$ 5,835.36
Monthly Payment:				486.28
 <u>Hull, Earlene *</u>				
Emp. # 942927 / 990701				
Union: SCGA				
		Years	Months	Days
Term of Service (including Sick Exchange):		19	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	June 27, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 10,498.48
	Final Base Pay			10,948.00
Average Social Security:				9,607.06
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service			2,164.08
Monthly Payment:				180.34

III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>Jackson, Lisa *</u>				
Emp. # 295957 / 990704				
Union: Local 1018C				
		Years	Months	Days
Term of Service (including Sick Exchange):		35	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	August 19, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 50,778.28
	Final Base Pay			48,752.00
Pension Allowed:	70.00 %			35,544.84
Monthly Payment:				2,962.07

<u>Johnson, Christian</u>				
Emp. # 2659 / 990715				
Union: BOE Non Union				
		Years	Months	Days
Term of Service (including Sick Exchange):		9	0	0
Sick Exchange:		0	0	0
Grounds:	Vested Early			
Effective Date:	September 25, 2015			
Termination Date:	October 3, 2013			
Average Salary:	Highest 2 out of last 5 years			\$ 120,377.11
	Final Base Pay			138,375.00
Pension Allowed:				
Unreduced Pension:	20.00%			\$ 24,075.48
Early Reduction Factor:	4.00 % for each year prior to age 60			16.00 %
Reduced Pension:				\$ 20,223.40
Monthly Payment:				1,685.28

<u>Keaveny, Brian *</u>				
Emp. # 941232 / 990702				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		31	4	24
Sick Exchange:		4	4	24
Grounds:	Service			
Effective Date:	July 14, 2015			
Average Salary:	Final Base Pay			\$ 81,825.89
Pension Allowed:	85.00 %			69,552.00
Monthly Payment:				5,796.00

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III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>King, Wayne *</u>				
Emp. # 916680 / 990708				
Union: Local 82				
		Years	Months	Days
Term of Service (including Sick Exchange):		6	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	July 11, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 56,167.22
	Final Base Pay			54,609.00
Pension Allowed:	15.00 %			8,425.08
Monthly Payment:				702.09
 <u>Kosinski, Claudette *</u>				
Emp. # 943113 / 990700				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange):		22	0	0
Sick Exchange:		4	0	0
Grounds:	Early			
Effective Date:	July 17, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 107,918.49
	Final Base Pay			81,901.00
Pension Allowed:				
Unreduced Pension:	57.70 %			\$ 62,268.96
Early Reduction Factor:	Actuarial reduction from age 55.9			9.21 %
Reduced Pension:				\$ 56,534.04
Monthly Payment:				4,711.17
 <u>Lussier, Linda *</u>				
Emp. # 903112 / 990695				
Union: Local 1018C				
		Years	Months	Days
Term of Service (including Sick Exchange):		41	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	July 31, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 63,166.39
	Final Base Pay			56,057.00
Pension Allowed:	70.00 %			44,216.52
Monthly Payment:				3,684.71

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III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>McCalla, Phillip *</u>				
Emp. # 942496 / 990697				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		25	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	July 12, 2015			
Average Salary:	Final Base Pay			\$ 86,929.79
Pension Allowed:	68.80 %			59,807.64
Monthly Payment:				4,983.97
<u>Morrison, Deborah *</u>				
Emp. # 904865 / 990699				
Union: Local 2221				
		Years	Months	Days
Term of Service (including Sick Exchange):		24	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	August 8, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 39,800.03
	Final Base Pay			36,487.00
Pension Allowed:	58.00 %			23,084.04
Monthly Payment:				1,923.67
<u>Palmer, Clethelda *</u>				
Emp. # 907944 / 990691				
Union: Local 1018F				
		Years	Months	Days
Term of Service (including Sick Exchange):		15	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	August 8, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 31,477.68
	Final Base Pay			32,632.00
Pension Allowed:	30.00 %			9,443.28
Monthly Payment:				786.94

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III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>Rios-Roman, Nancy *</u>				
Emp. # 903573 / 990705				
Union: Local 1018C				
		Years	Months	Days
Term of Service (including Sick Exchange):		26	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	August 26, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 48,325.92
	Final Base Pay			48,752.00
Pension Allowed:	52.00 %			25,129.44
Monthly Payment:				2,094.12
 <u>Roderick, James</u>				
Emp. # 914435 / 990712				
Union: Local 82				
		Years	Months	Days
Term of Service (including Sick Exchange):		6	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	July 31, 2015			
Average Salary:	Highest 3 out of last 5 years			\$ 72,134.18
	Final Base Pay			51,038.00
Pension Allowed:	15.00 %			10,820.16
Monthly Payment:				901.68

III. Regular Retirements (continued)

		<u>AMOUNT</u>		
<u>Roldan, Luis *</u>				
Emp. # 944182 / 990706				
Union: SCGA				
		Years	Months	Days
Term of Service (including Sick Exchange):		14	0	0
Sick Exchange:		0	0	0
Grounds:	Vested Service			
Effective Date:	May 19, 2015			
Termination Date:	May 13, 2015			
Average Salary:	Highest 5 out of last 10 years			\$ 10,116.65
	Final Base Pay			10,948.00
Average Social Security:				9,611.75
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service			1,487.04
Monthly Payment:				123.92
 <u>Waller, Terry *</u>				
Emp. # 940760 / 990698				
Union: Local 760				
		Years	Months	Days
Term of Service (including Sick Exchange):		31	7	6
Sick Exchange:		3	7	6
Grounds:	Service			
Effective Date:	July 12, 2015			
Average Salary:	Final Base Pay			\$ 130,604.70
Pension Allowed:	85.00 %			111,014.04
Monthly Payment:				9,251.17

* These benefits are being presented for ratification. The first payments were made in August 2015.

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IV. Terminated Vested – Requests to Vest Benefits

A motion was made, seconded and unanimously adopted to approve the following requests to vest benefits:

	<u>AMOUNT</u>
<u>Bromfield, Sharon</u>	
Emp. # 362719	
Union: CHPEA	
Date of Termination:	March 3, 1994
Term of Service:	11 years
Grounds:	Vested Service
Normal Retirement Date:	December 12, 2017 (Age 60)
Average Salary:	Highest 2 out of the last 5 years
	Final Base Pay
	\$ 42,484.33
Pension Allowed:	22.00 %
Monthly Payment:	9,346.56
	778.88
<u>Crooms, John</u>	
Emp. # 909908	
Union: Local 1018D	
Date of Termination:	August 7, 2015
Term of Service:	17 years
Grounds:	Vested Service
Normal Retirement Date:	February 2, 2029 (Age 60)
Average Salary:	Highest 5 out of the last 10
	years
	Final Base Pay
	\$ 40,981.92
Pension Allowed:	34.00 %
Monthly Payment:	36,081.00
	13,933.80
	1,161.15
<u>Petit, Urania</u>	
Emp. # 945842	
Union: Unclassified	
Date of Termination:	May 22, 2015
Term of Service:	6 years
Grounds:	Vested Service
Normal Retirement Date:	November 9, 2028 (Age 60)
Average Salary:	Highest 2 out of the last 5 years
	Final Base Pay
	\$ 80,536.46
Pension Allowed:	15.00 %
Monthly Payment:	80,000.00
	12,080.52
	1,006.71

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IV. Terminated Vested – Requests to Vest Benefits (continued)

			<u>AMOUNT</u>
Pino, Raul			
Emp. # 945977			
Union: Unclassified			
Date of Termination:	June 1, 2015		
Term of Service:	8 years		
Grounds:	Vested Service		
Normal Retirement Date:	June 26, 2023 (Age 60)		
Average Salary:	Highest 2 out of the last 5 years		\$ 123,149.15
	Final Base Pay		123,085.00
Pension Allowed:	20.00 %		24,629.88
Monthly Payment:			2,052.49

V. Separations from Pension Payroll

The following separations from Pension Payroll were placed on file:

<u>EMPLOYEE</u> <u>NUMBER</u>	<u>NAME</u>	<u>DATE OF</u> <u>DEATH</u>	<u>PENSION</u> <u>AMOUNT</u>	<u>PENSION</u> <u>PLAN</u>
980165	Baio, Maureen	07/07/2015	\$ 828.58	MERF
S114980	Clarke, Marie	07/11/2015	1,144.11	MERF
990199	Craig-Murray, Joyce	07/17/2015	201.12	MERF
S169782	Daniel, Bettie	08/05/2015	560.59	MERF
277762	Gardiner, William	08/28/2015	6,351.69	MERF
278637	Garrahy, Edward	08/09/2015	4,135.14	MERF
370142	Jarm, Victor	08/13/2015	4,222.21	MERF
435147	Leahy, Elizabeth	08/08/2015	435.01	MERF
S455431	Lowe, Mary	07/13/2015	100.84	MERF
516902	Milano, Kathryn	07/03/2015	1,677.32	MERF
523178	Montgomery, Elvida	08/24/2015	1,011.58	MERF
532851	Moses, Ophelia	07/01/2015	1,553.20	MERF
980140	Mullen, Marie	06/13/2015	727.47	MERF
980302	Murphy, Geraldine	08/22/2015	1,057.14	MERF
544612	Murray, Evelyn	07/29/2015	2,012.06	MERF
597678	Pittman, Leonard	08/27/2015	4,201.30	MERF
942200	Prebish, Alice	08/12/2015	117.45	MERF
608440	Propiescus, Gloria	08/10/2015	894.84	MERF
372366	Reliford, Barbara	08/27/2015	2,250.68	MERF
980142	Scannell, Andrea	08/27/2015	1,430.20	MERF
669466	Shannon, Patrick	08/25/2015	1,430.44	MERF

V. Separations from Pension Payroll (continued)

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
692255	Sunday, Marian	08/31/2015	\$ 616.35	MERF
S695522	Spillane, Rosalie	07/08/2015	601.51	FRF
726060	Theriault, Lucien	08/16/2015	5,541.46	MERF

The pensions for the following individuals have been reinstated since the Pension Unit has received verification of their addresses and/or status.

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
093734	Japp, Margaret	07/01/2015	\$ 578.30	MERF
777366	Williams, Marjorie	07/01/2015	2,257.91	MERF

VI. Request for Refunds of Pension Contributions

A motion was made, seconded and unanimously adopted to approve the following refunds of pension contributions:

<u>NAME</u>	<u>AMOUNT</u>
Alamo-Quinonez, Alfonso *	\$ 376.85
Allukian, Kristin *	52.05
Alsharif, Ali	9,441.14
Anderson, Paul *	400.97
Aviles, Evelyn *	159.88
Babbitt, Janet *	457.41
Barberan, Alexandra	859.98
Belliveau, Martha	151.56
Bermudez, Jesus *	18.05
Bernabucci, Carol	508.93
Berrios, Jose *	34.99
Blake, Blaine	1,005.03
Breen, Diosmedy	1,832.50
Brigantti, Moises *	255.48
Bryan, Sonia	153.00
Bryant, Gloria *	487.19
Buddhu, Satesh	102.45
Buff, Bruce *	169.95

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VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
Caldwell, Taylor ***	\$ 42,397.58
Caldwell, Victoria ***	42,397.58
Canty, Carolyn	10.71
Capers, Derrick	50.64
Castro, Norma *	24.27
Chao, Zachary	64.45
Clarke, Bryant *	2,774.73
Colon, Rosalyn *	200.41
Cospito, Jon *	1,387.44
Craig, Charmaine *	110.72
Daley, Ellie *	799.62
Davis, Clarice	4,549.47
Davis, Wanda	1,428.58
Dejesus, Maria *	13.61
Delgado, Iveliss *	66.64
Delgado-DeJesus, Lourdes	1,729.38
D'Errico, Judy *	323.29
Diaz, Dorka *	4,048.24
Dixon, Brandon	3,542.28
Dodds, Khara	14,762.72
Drake, Kathleen	58.57
Drakeford, Jeffrey	5.70
Edwards, Felicia	591.61
Evans, Carlana	3,534.94
Fair, Craig	874.46
Fort, Theola *	97.06
Freeman, Shola	56,458.35
Galpin, Richard	1,462.78
Gibbs, Anthony	7,049.14
Gonsalves, Margaret	252.38
Grant, Tiffany	3,346.10
Hacia, Kathleen	595.38
Harris, Audrey	312.15
Harris, Conectia	362.34
Harris, Dana	739.15
Harvey, Olivia	8,411.25
Henry, Auden	6,485.65
Henry, Harold	584.54
Hussain, Syed	17,718.78
James, Geneva	15.70

VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
Johnson, Deborah	\$ 278.73
Johnson, Grace	1,341.01
Johnson, Lolitia	7,546.96
Johnson, Whitney	720.00
Kowles, Kerin	43.51
Lawton, Philip	2,139.91
Lucy, Marvis **	1,293.76
Maruca, Baron	12,433.90
May, Patricia	69.06
McCrorey, Queen	1,782.18
Miller, E. Loretta **	1,293.76
Nielson, Jeri-Ann	7,566.96
Ortiz, Wanda *	331.83
Padilla, Rosa	733.68
Placido, Adina	11,713.95
Podrebartz, Keith	1,256.46
Sabra, Ponn*	66.79
Tabrard, Donna	2,567.72
Thompson, Craig	199.02
Velez, Maria	241.00
Wang, Ruonan	7,839.93
Waterman, Jasmine	3,775.84
Waters, Marcenia *	12.90
Weinle, Marie	553.82

None of the above members is vested, or, if vested, he or she had been informed of, and had waived, his or her rights to a vested benefit in lieu of a contribution refund. The amounts shown above include interest.

* Additional contributions or interest due to the member

** Beneficiary of deceased active MERF member Earnest Baldwin

*** Beneficiary of deceased terminated MERF member Douglas Caldwell

VII. Service Purchases

Routine Service Purchases

Chairman Stevens introduced the item. The Plan Administrator stated that the following individuals had requested the purchase of additional pension service under the provisions of the Municipal Code of the City of Hartford, Article I, Division I, Section 2A-8.

The requests were accepted and placed on file.

<u>NAME</u>	<u>TYPE</u>	<u>AMOUNT</u>			<u>PURCHASE</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	<u>PRICE</u>
Milledge, Tony **	Military	2	6	12	\$ 22,783.62
Rivera, Katiria **	CMERS	2	2	9	2,091.40
Rodriguez, Adiel *	CMERS	3	0	2	4,184.47

* This individual had completed his service purchase.

** This individual had selected payroll deduction.

Other Service Purchases

Cruz, Felicita

Type of Service: Purchase refunded CMERS service from October 2000 to September 2004

Amount of Service: 3 years, 10 months and 20 days

Chairman Stevens introduced the item. The Plan Administrator, Donna Parker, reported that there was a non-routine purchase request before the Commission. Ms. Parker explained that Felicita Cruz had transferred from CMERS to HMEA in 2004 and had received a refund of CMERS contributions at that time. Ms. Parker stated that CMERS contributions could not be transferred to the City once refunded and that Ms. Cruz had requested a hearing with the Commission to be allowed to purchase her CMERS service as an exception to the rule, which would allow her to participate in the pre-2003 HMEA plan, instead of the less generous post-2003 HMEA plan.

Commissioner Frank Lord noted that he had not received a copy of the letter addressed to him that requested a hearing. Ms. Cruz replied that she had only sent it to Treasurer Cloud. Ms. Parker informed Ms. Cruz that if the Commission allowed the purchase of CMERS service, Ms. Cruz would have to repay approximately \$20,000 in contributions plus \$12,000 in interest. Ms. Cruz asked why the amount was so high. Ms. Parker explained that these amounts included

CMERS contributions, the contribution differential between CMERS (2.25%) and HMEA (6.00%), the contribution differential between the pre-2003 HMEA plan and the post-2003 HMEA plan plus the interest the CMERS contributions would have earned had they been in the MERF since 2004.

Ms. Cruz also noted that she was essentially losing 9 years of service due to the pre-2003 HMEA contract that allowed for unreduced retirement after 20 years versus the post-2003 HMEA contract that allowed for unreduced retirement after 25 years.

Ms. Parker stated that Ms. Cruz had requested to purchase this service five times in the past and had been denied each time. Ms. Parker presented to the Commission documentation of prior cases that had been appealed to the Commission, all of which were denied by the Commission. Ms. Parker explained that Ms. Cruz could bring her request to the HMEA union to negotiate a window in the contract. J. Sean Antoine, Principal Administrative Analyst and HMEA President, reported that this issue was on the agenda for the new contract negotiations as there were approximately 15 other HMEA members in a similar situation.

Secretary Cloud asked Assistant Corporation Counsel Lisa Silvestri to explain in more detail the broader discussion regarding breaks in service and Pension Commission domain versus City Council domain. Attorney Silverstri explained that breaks in service occurred when an employee left the City of Hartford and returned after a period of time which was different than Ms. Cruz's situation. Ms. Silvestri went on to explain that requests to buy back prior service and close a break in service currently go to City Council and City Council had asked that these requests be presented to the Pension Commission instead. Ms. Silvestri noted that there was an ordinance in front of City Council for the next meeting that would give the Pension Commission authority to approve requests if the break in service was shorter than the prior service period, while approval of breaks in service longer than the prior service period would remain with City Council.

Commissioner Lord recommended that the Commission deny the request under the existing HMEA contract and City ordinances and based on past precedence. Secretary Cloud expressed concern about future legal issues if HMEA rules were changed in the future. Chairman Stevens noted that the Commission had been made aware that there may be changes down the road.

A motion was made, seconded and unanimously adopted to deny the service purchase without prejudice, subject to reopening in the future if the rules changed.

VIII. Qualified Domestic Relations Orders

Chairman Stevens introduced the item. The Plan Administrator reported that the Pension Unit had received one properly executed Qualified Domestic Relations Orders (QDRO) for the MERF. The Plan Administrator recommended that the Commission approve the Order as presented.

A motion was made, seconded and unanimously adopted to approve the following QDROs, with assignments as indicated, subject to like reductions in the contribution and pension accounts of the plan member.

MERF

QDRO: 15-7
Entered into Court Records: June 8, 2015
Benefit Calculation Date: October 5, 2010

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	25.00 %	\$ 171.42
Pension Contributions Assigned:	Pre-Tax:	25.00 %	5,313.70
	Post-Tax:	25.00 %	0.00
	Interest:	25.00 %	0.00

Alternate Payee Retirement Date: December 12, 2029

IX. Other Business

Chairman Stevens introduced the item. There was no Other Business to come before the Commission at this meeting.

There being no further business, Chairman Stevens adjourned the Pension Administration portion of the meeting at 10:25 a.m.

Attest:



Adam M. Cloud, Secretary