

OPEN MINUTES OF THE MEETING
1,285th BOARD MEETING
STATE RETIREMENT BOARD

DATE: February 20, 2025

TIME: 10:00 AM

PLACE: One Winter Street, Boston, MA 02108/Remote

There being a quorum present, the February 20, 2025 meeting of the State Retirement Board ("Board") was called to order at 10:01 a.m. by the Chair & Treasurer, Deborah Goldberg.

Treasurer Goldberg announced that pursuant to the Commonwealth's Open Meeting Law Massachusetts General Law Chapter 30A, §20, as amended by Chapter 107 of the Acts of 2023, that the meeting of the Board was being held via the Internet and was being called to order with the following members who would be participating remotely for all or part of the meeting and who were identified at this time: Deborah Goldberg, Chair, Treasurer, & Receiver General; Archibald Gormley, Jr., Chosen Member; Theresa McGoldrick, Elected Member; Frank Valeri, Elected Member; Joanne Goldstein, Appointed Member. Ms. Goldstein joined the meeting at 10:22 a.m. Ms. McGoldrick exited the meeting at 12:29PM. Unless otherwise noted, all votes taken at the meeting were taken by roll call vote.

Board staff that were present or participated remotely for all or part of the February 20, 2025 meeting were: Kathryn Kougas, Executive Director; Sandor Zapolin, Deputy Executive Director/ Chief Operating Officer; Yande Lombe, Associate Board Counsel; Jennifer Hunt, Associate Board Counsel; Joisei Horton, Manager, Disability Unit; Robert Liford, Disability Case Counselor; Stephanie Sicard, Assistant Director of Benefit Calculations; Jasmine Chasse, Disability Retirement Case Counselor; Sharon Sullivan, Director, Finance & Budget; Cecilia Yau, Audit Supervisor; Matthew Szafranski, Associate Board Counsel; Diana Reyes, Director of Disbursements & Survivor Benefits; Alison Eggers, Deputy General Counsel; Pam Diggs, Senior Paralegal; Athila Soares-Nunes, Paralegal; Lisa Zale, Assistant Director, Disability Unit; Michael Sarnie, Business Lead; Paula Daddona, Director of Member Experience, Communications & Operations; Zachary Pierce, Communications Coordinator II; Lauren Lavanchy, Communications Coordinator; and Laura Mercure Executive Assistant & Office Manager.

Treasury staff that participated remotely for all or part of the meeting were: Lizandra Gomes, Deputy Chief of Staff, DE&I Program Manager; Emily Kowtoniuk, Legislative Director; John Durgin, Associate Counsel; Brendan McGough, Associate Counsel; Andrew Napolitano, Deputy Communications Director; Sandra DeSantis Lynch, General Counsel.

Ten guests participated remotely for all or part of the meeting. The guests' names were: Jerome Whittington and attorney Charlie Casartello, JA Leighton, attorney Nicholas Ellis, attorney Robin Borgstedt, attorney Brian Sullivan, Maribeth Robichaud and attorney Matt Feeney and John Boorack, PERAC Actuary.

Members of the public were provided access to the meeting via a GoToWebinar link. No members of the public registered.

Treasurer Goldberg announced in accordance with the Commonwealth's Open Meeting Law that any person may make a video or audio recording of an open session of a meeting to a public body, and she was obligated to inform participants of any recording at the beginning of the meeting. Treasurer Goldberg announced that for any members of the public accessing the open portion of the Board meeting, that access would conclude when the Board entered executive session and resume when the Board returned to Open Session.

MINUTES OF THE JANUARY 23, 2025 BOARD MEETING

On a motion made by Mr. Valeri, and seconded by Mr. Gormley, Jr., the Board voted to approve the Open Session Minutes and the Executive Session Minutes of the 1,284th Board Meeting held on January 23, 2025.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

THE BOARD ENTERS INTO EXECUTIVE SESSION

At **10:04 a.m.**, the Board entered Executive Session for today's meeting on February 20, 2025, to review applications for disability retirement, associated benefits, litigation strategy, and to consider the reputation, character, physical condition, or mental health of individuals with business before the Board. Treasurer Goldberg indicated that the Board would reconvene in Open Session after the Executive Session.

EXECUTIVE SESSION CONCLUDES AND THE BOARD RECONVENES IN OPEN SESSION

At **11:41 a.m.** the Board concluded Executive Session and voted to reconvene in Open Session. Mr. Gormley, Jr., made a motion to reconvene in Open Session, Mr. Valeri seconded the motion.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

TAB 2: GROUP CLASSIFICATIONS

Group 2

Pursuant to the Board's Classification Policy the following are reported as approved for Group 2 Classification:

1. Michael Candito - First Assistant Chief Probation Officer, MA Trial Court
2. John Corneau – Social Worker I, DCF
3. Linda Cox – Vocational Instructor A/B, Wrentham Development Center, DDS
4. Nydia Marrero – Social Worker II, DCF
5. John Turowsky – Industrial Instructor III / C.O., Hampden County Sheriff's Department
6. Maryann Vautrinot – Social Worker III, DCF
7. Maria Vasquez – RN III, Taunton State Hospital, DMH
8. Stephen Zablocki – Transportation Officer, DYS

Group 2 (Board Review)

1. Lisa Anair - RN II, DDS

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to approve Ms. Anair's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

2. Thomas Black – Administrative Officer IV, DYS

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to approve Mr. Black's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

3. Kathleen Brandao – Habilitation Coordinator I, Wrentham Developmental Center, DDS

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to approve Ms. Brandao's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

4. Besaida Gomez

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to approve Ms. Gomez's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

5. William Laisure

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to deny Mr. Laisure's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

6. Pamela Lafferty

On a motion made by Mr. Valeri, and seconded by Ms. McGoldrick, the Board voted to approve Ms. Lafferty's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

7. Stephen Meczywor

On a motion made by Mr. Valeri, and seconded by Ms. McGoldrick, the Board voted to approve Mr. Meczywor's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

GROUP 2 HSC II (Board Review)

1. Iris Bell - HSC II, DMH

On a motion made by Ms. Goldstein, and seconded by Mr. Valeri, the Board voted to approve Ms. Bell's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

2. Robin Wallace – HSC II, DMH

On a motion made by Ms. Goldstein, and seconded by Mr. Valeri, the Board voted to deny Ms. Wallace's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Group 2 Pro-Rate

Pursuant to the Board's Classification Policy the following are reported as approved for Group 2 Pro-Rate Classification:

1. Pamela Hickey

Department of Developmental Services

MRW I - 02/10/1991 - 11/16/1991

ADL Coordinator - 11/17/1991 - 10/04/1992

MRW III- 10/05/1992 - 02/26/1994

Residential Supervisor I - 06/15/1997 - 12/15/2001

Residential Supervisor A/B - 12/16/2001 - 08/09/2003

Residential Supervisor II - 08/10/2003 - 11/14/2006

2. Freda Malone

Department of Children and Families

SW I - 09/23/1990 - 01/30/1992

SW I - 09/26/1993 - 04/29/1995

SW III - 04/30/1995 - 07/27/1997
SW IV - 07/28/1997 - 12/15/2001
SW D - 12/16/2001 - 01/23/2016
SW III - 01/24/2016 - 02/11/2023

3. Kendra Mello

Department of Mental Health

Clinical Social Worker A/B 04/04/2010 - 05/25/2013
HSC C – 05/26/2013 - 02/23/2019

4. Denis Pilotte

Department of Children and Families

SW I - 11/06/1988 - 04/10/1993
SW III - 04/11/1993 - 11/20/1999
SW IV - 11/21/1999 - 12/15/2001
SW D - 12/16/2001 - 02/20/2016

Group 2 Pro-Rate (Board Review)

1. Kelly Guarino

Chelsea Soldiers' Home

LPN II - 11/05/2000 - 08/08/2015
RN I - 08/09/2015 - 09/03/2016
RN II - 09/04/2016 - 10/22/2022

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to deny Ms. Guarino's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

2. Pamela Hickey

Department of Developmental Services

MRW IV - 02/27/1994 - 06/14/1997
HSC A/B - 01/15/2006 - 02/12/2011

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Hickey's Group 2 classification applications for both the MRW and HSC A/B roles.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

3. Sarah Jolliffe

Department of Developmental Services
Qualified Mental Retardation Professional I
10/18/1992 - 04/07/1997

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to approve Ms. Jolliffe's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

4. Andrew Teasley

Hampden County Sheriff's Department
Correctional Counselor/C.O. 03/25/2013 - 04/27/2019
Substance Abuse Educator Supervisor
04/28/2019 - 04/01/2025

On a motion made by Ms. McGoldrick and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Teasley's Group 2 classification application for the Correctional Counselor / C.O. role.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

On a motion made by Ms. McGoldrick and seconded by Mr. Gormley, Jr., the Board voted to approve Mr. Teasley's Group 2 classification application for the Substance Abuse Educator Supervisor role.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Group 2 Pro-Rate (Reconsideration) (Board Review)

1. Marybeth Robichaud	Barnstable County Sheriff's Office County Screener/ Mass Boot Camp 01/25/1994 - 09/30/1994 Electronic Monitoring Coord 10/01/1994 – 09/24/1995 Boot Camp Screener / Bracelet Program & Earned Good Time Coordinator/ County Inmate to State Min. Coord 09/25/1995 – 09/14/1997 Electronic Monitoring Coord 09/15/1997 – 06/30/2011 Re-entry Coord 07/01/2011 – 06/21/2017
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Mr. McGough provided a synopsis of the Robichaud matter. There was some ambiguity in the job titles she held. She and her attorney, Mr. Feeney, were present to request a reconsideration on this matter. Mr. Feeney said that the original request had not provided sufficient information. He said that her roles all involved the recruitment of prisoners, onboarding and communication with them, and follow up with them. He said that she was with inmates over 50% of her time and was in essence a Corrections Officer.

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to reconsider Ms. Robichaud's Group 2 classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

On a motion made by Mr. Valeri and seconded by Ms. McGoldrick, the Board voted to approve Ms. Robichaud's Group Classification change to a Group 2 classification.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Group 4

Pursuant to the Board's Classification Policy the following are reported as approved for Group 4 Classification:

1. William Colon - Correction Officer I, DOC
2. Cory Flashner - ADA, Suffolk County District Attorney's Office
3. Wilton Gray - Environmental Police Officer, EOEEA
4. Bruce Humphreys - Correction Officer, Middlesex County Sheriff's Office
5. John Latino - Correction Officer I, DOC
6. Norma Longe - Industrial Instructor I, DOC
7. Audrey Mark - ADA, Suffolk County District Attorney's Office
8. James McKinnon - Industrial Instructor III, DOC
9. Maurice Nichols - Correction Officer, Hampden County Sheriff's Department
10. Kevin Nolli - Sergeant, Berkshire County Sheriff's Office
11. John Sheridan - Industrial Instructor III, DOC
12. Larry Shorey - Industrial Instructor III, DOC
13. Jayme Talbot - ADA, Northwestern District Attorney's Office
14. Andrew Vignali - Field Parole Officer A/B, Massachusetts Parole Board
15. Derek Webb - ADS, Plymouth County Sheriff's Department

Group 4 (Board Review)

1. Jeffrey Crowe – First Residential Supervisor / C.O., Hampden Co. Sheriff's Department

On a motion made by Ms. McGoldrick and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Crowe's Group 4 Classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

2. Raymond Samms – Campus Police Officer, Bunker Hill Community College

On a motion made by Ms. Goldstein and seconded by Ms. McGoldrick, the Board voted to deny Mr. Samms' Group 4 Classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

3. Michael Sawyer – Residential Supervisor IX/C.O., Hampden Co. Sheriff's Department

On a motion made by Ms. McGoldrick and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Sawyer's Group 4 Classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Group 4 CPO (Board Review)

1. Keith Donahue – CPO C, DOC

On a motion made by Mr. Valeri and seconded by Mr. Gormley, Jr., the Board voted to approve Mr. Donahue's Group 4 Classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

2. Heather Messier – CPO A/B, DOC

On a motion made by Ms. McGoldrick and seconded by Mr. Valeri, the Board voted to approve Ms. Messier's Group 4 Classification application.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Group 4 Pro-Rate

Pursuant to the Board's Classification Policy the following are reported as approved for Group 4 Pro-Rate Classification:

- | | |
|--------------------|--|
| 1. Michael Leblanc | Department of Corrections
Correction Officer I - 11/03/2013 - 02/23/2025 |
| 2. Nichole Macneil | Suffolk County Sheriff's Department
Correction Officer - 11/18/2013 - 05/20/2024 |

20/50

Pursuant to the Board's Classification Policy the following are reported as approved for 20/50 Classification:

1. **Paul Alves** - Correction Officer, Bristol County Sheriff's Office
2. **Christopher Hodgson** - Correction Officer I, DOC

Tab 3: REPORT OF THE EXECUTIVE DIRECTOR

John Boorack, PERAC Actuary, was a guest speaker and provided details about the annual Actuarial Report entitled, "State Retirement System Actuarial Valuation Report." The Report is available for download online through the mass.gov website. He brought several highlights from the report to the attention of the Board and attendees including:

- The unfunded liability had decreased slightly over the previous year (page 3)
- The assets were growing faster than liabilities (page 7)
- There will likely be deferred losses this year and we will need gains over the next few years to offset them (page 9)
- Mr. Boorack defined the LDRom (page 21) as a check performed that looks at what the liability of the plan would have been if it had all been invested in bonds

Mr. Valeri asked what the non-asset losses were attributed to. Mr. Boorack said that it could be a number of factors including unexpectedly high salary increases or accounting for members who had passed away.

- M.G.L. c. 32, s. 3(8)(c) reimbursements are added to expenses because they go into the general fund and are moved from the general fund back into the pension fund.

Business Operations Report

- Ms. Kougias reported that enrollment forms are not always submitted for new members. Outreach is done consistently to remind agencies to submit the forms. Without the form, MSRB staff cannot establish an account on MARIS with all critical information. It causes administrative problems and disrupts staff's ability to provide necessary customer service. Staff have developed a reporting mechanism to track this information. Over a five-year period, MSRB estimates it has not received approximately 10,000 enrollment forms, with over 6,600 of those being for active members. Although repeated outreach attempts are made to get the forms, we have been unsuccessful. In January, Ms. Kougias and Mr. Zapolin met with Melissa Pullin, Chief Human Resources Office, at the Human Resources Division (HRD), to address the issue. Ms. Pullin offered to work with staff and arrange a meeting between MSRB staff and the Executive Office secretariats to gain their cooperation.
- Ms. Kougias informed the Board that Phase III is underway to examine other exception categories to expand the Estimated Initial Benefit Payments program.
- The Supplementary Schedule report, a report that includes every member's Annuity Savings, is scheduled for release with the FY2025 Annual Report.
- The Violent Assault Disability Act (VADA) design and implementation grooming sessions are being scheduled.
- There are several open positions and filling those will further stabilize SRB's staffing. The budget season starts in March and SRB will continue to examine headcount and explore potential future positions to offer improved solutions.
- The monthly warrants and other distributions were highlighted. The first payments showed an increase month-over-month. Much is attributed to the success of the Estimated Initial Benefit Payments. For the 12-month period (February 2024 through January 2025), there have been over 950 payments processed via EIBP. The Benefit Adjustments are under control with adjustments through 2023 have been completed; approximately 100 remain for 2024 and staff have begun to receive requests in 2025.
- The monthly expense reports were presented with the operating expenditures at 45.77% of budget and the capital expenditures at under 1% through January 31, 2025.
- Call volume and member outreach remain consistent month-over-month.
- The MSERS and MTAERS PRIT performance report was included for the Board's review. Calendar year-to-date performance through December 31, 2024 was 9.07% with assets just over \$110 billion.

- 1099R forms were issued in January. PayInfo, the Comptroller’s online system that provides members with access to their 1099R forms, is inoperable currently. In order to address this issue, MSRB has been reissuing 1099Rs upon request since access to PayInfo has been interrupted.
- Ms. Kougias asked the Board to vote on 5 suspensions for failing to comply with the requirements of Section 91A. These 5 individuals were granted tax extensions, but those extensions had expired, and the individuals failed to file their Annual Statement of Earned Income with PERAC before the deadline.

Based on the information presented, on a motion made by Ms. Goldstein and seconded by Mr. Gormley, Jr., the Board approved suspending members’ benefits if compliance of Section 91A was not met by the monthly benefit cut-off date, February 21, 2025.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Absent
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

- Per Board policy, the Board is required to vote to allow staff members to travel out of state. Two IT staff will attend the Public Retirement Information Systems Management (PRISM) Annual Conference in Memphis, Tennessee. The registration cost per attendee is \$1,299 (if registered on or before March 21st).

On a motion made by Mr. Gormley, Jr., and seconded by Ms. Goldstein, the Board approved payment for the out-of-state registration for two IT staff to attend the PRISM 2025 Annual Conference.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Absent
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

Legal Update

Ms. Diggs discussed four Division of Administrative Law Review decisions featured in the February Legal Update Memorandum. *Godfrey v. State Bd. of Ret.* concerned a Certified Nursing Assistant who was injured in 2013 while rolling a patient. She applied for accidental disability retirement, but her application was denied after the medical panel answered “no” on the question of causation. DALA rejected arguments concerning, among other things, alleged prejudice and petitioner’s assertion that certain doctors’ statements regarding pre-existing

conditions were “absolutely false,” “preposterous,” and a “fabrication,” and affirmed the Board’s denial. In *Paschal v. State Bd. of Ret.*, a basketball coach appealed the Board’s denial of requested contract service buyback for 6 periods of seasonal employment prior to his membership in the MSERS. DALA affirmed the Board’s denial, explaining that the breaks in service between basketball seasons violated the regulatory prohibition of a break of more than 180 calendar days between separate periods of eligible contract service. Ms. Diggs also reviewed two group classification decisions affirming Board decisions that denied Group 2 classification to members who did not demonstrate the requisite care, custody, instruction or supervision of prisoners. In *Zoghopoulos-Brown*, DALA found that a Medical Records Clerk at MCI Concord did not meet the statutory requirements because her contact with inmates was, among other things, fleeting, administrative in nature, and under the supervision of others tasked with custody of the inmates. In *Spellman* DALA found that an Assistant Court Services Coordinator with the Office of Community Corrections was properly classified in Group 1 because the majority of the people with whom he worked were not prisoners or parolees.

Board and MSRB Communications

The latest eNews for retirees and active members included beneficiary information, fraud alerts, and updates on the Social Security Fairness Act and HERO Act. Articles of interest on Artificial Intelligence (“AI”) were included. Ms. Kougias was asked to join the Treasurer’s working group to establish an AI policy and to explore the impact and potential usage of AI.

Mr. Valeri offered comments on the estimated benefits process and said that the numbers are outstanding. He thanked the Treasurer and MSRB staff for their work. He also provided some updates regarding the Social Security Fairness Act and said that members are starting to see social security benefits as a result of the repeal of the WEP/GPO. Mr. Valeri said he believed this law would be implemented regardless of political changes. He also said that previously denied spousal benefits are being processed.

Adjournment

On a motion made by Ms. Goldstein and seconded by Mr. Gormley, Jr., the Board voted to adjourn the meeting at 12:57 p.m.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Absent
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Treasurer Goldberg	Yes

The next meeting of the State Board of Retirement is scheduled for Thursday, March 27, 2025 at 10:00 a.m.