

OPEN MINUTES OF THE MEETING
1,288th BOARD MEETING
STATE RETIREMENT BOARD

DATE: May 29, 2025

TIME: 10:00 AM

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

There being a quorum present, the May 29, 2025 meeting of the State Retirement Board ("Board") was called to order at 10:00 a.m. by the Treasurer & Chair, Deborah Goldberg.

Treasurer Goldberg announced that pursuant to the Commonwealth's Open Meeting Law Massachusetts General Law Chapter 30A, §20, as amended by Chapter 2 of the Acts of 2025, 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; Emily Kowtoniuk, Legislative Director; Archibald Gormley, Jr., Chosen Member; Joanne Goldstein, Appointed Member; Frank Valeri, Elected Member and Theresa McGoldrick, Elected Member. 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 May 29, 2025 meeting were: Kathryn Kougias, Executive Director; Sandor Zapolin, Deputy Executive Director/Chief Operating Officer; Yande Lombe, Associate Board Counsel; Jacqueline Sullivan, Associate Board Counsel; Matthew Szafranski, Associate Board Counsel; Diana Reyes, Director of Disbursements & Survivor Benefits; Alison Eggers, Deputy General Counsel; John Durgin, Associate General Counsel; Pamela Diggs, Senior Paralegal; Athila Soares-Nunes, Paralegal; Kanan Gasimov, Paralegal; Stephanie Sicard, Assistant Director, Benefit Calculation; Yves Sanon, Benefit Calculation QA Analyst; Lisa Zale, Assistant Director, Disability Unit; Joisei Horton, Disability Retirement Manager; Jasmine Chasse, Disability Retirement Case Counselor; Robert Liford, Disability Retirement Case Counselor; Marsha Knight, Disbursement Manager; Elizabeth Durfee, Benefits Calculation Analyst; Paula Daddona, Director of Member Experience, Communications & Operations; Zachary Pierce, Communications Manager; 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; Chandra Bork, Chief of Staff; Andrew Napolitano, Deputy Communications Director; Elizabeth Morrocco, Associate General Counsel/Procurement Director; Sonia McCallum, Associate General Counsel; and Sandra DeSantis Lynch, General Counsel.

Sixteen guests participated remotely for all or part of the meeting. Their names were: Chief Brian Nardelli, Donald Spaulding, Attorney Earlon Seeley, Mark Zepke, Attorney Kelli Silva, Scott Leeds, Attorney Stephen Allard, Timothy Melanson, Attorney Leigh Panetti, Arthur O'Connell, Attorney Paul Hynes, William McLaughlin, Attorney Thomas Downey, Raymond Provost, and Hearing Officer,

Rachael Healey.

Members of the public were provided access to the meeting via a GoToWebinar link. Ten members of the public registered. Their names were: Michela Adams, Kristyn Camilleri, Erin Colameco, Nicole DeFrancesco, Brian Ferraro, Julie Hartling, Barbara Maher, Robert Stephanian, John Tamoosh, and Carol Billings.

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 APRIL 24, 2025 BOARD MEETING

On a motion made by Ms. Goldstein, and seconded by Mr. Gormley, Jr., the Board voted to approve the Open Session Minutes and the Executive Session Minutes of the 1,287th Board Meeting held on April 24, 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

THE BOARD ENTERS INTO EXECUTIVE SESSION

At **10:02 a.m.**, the Board entered into Executive Session for today's meeting on May 29, 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.

On a vote made by Mr. Gormley, Jr., and seconded by Ms. Goldstein, the Board voted to enter Executive Session.

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

EXECUTIVE SESSION CONCLUDES AND THE BOARD RECONVENES IN OPEN SESSION

At **12:57 p.m.** the Board voted to conclude the Executive Session and to reconvene in Open Session.

Ms. Goldstein made a motion to reconvene in Open Session and Mr. Gormley, Jr., 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
Ms. Kowtoniuk	Yes

Group 2

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

1. **Jacqueline Alves** – Social Worker II, DCF
2. **Cheryl Blow** - LPN II, Holyoke Soldier’s Home
3. **Sharon Deacon** - Social Worker III, DCF
4. **Denise Duffy** - Rehabilitation Counselor A/B, Taunton State Hospital, DMH
5. **Victor Gonzalez** - Social Worker II, DCF
6. **Vivi Ann Leighton** - Vocational Coach Culinary Manager, Valley Collaborative
7. **Ana-Maria Lomba** – Social Worker II, DCF
8. **Lisa Moore** - DSW III, Wrentham Developmental Center, DDS
9. **John Orszulak** – Correctional Chef, Hampshire Sheriff’s Office
10. **Maria Pastula** - Nursing Assistant I, Holyoke Soldier’s Home
11. **David Renna** – Chaplain II, DOC
12. **Madelyne Rivas** – Social Worker II, DCF
13. **Brian Ryan** – Maintenance Officer/ Lead Electrician, Plymouth County Sheriff’s Department
14. **R. Scott Sibley** – Court Officer III, Mass Trial Court
15. **Mark Szydluk** - MHW IV, Worcester Recovery Center and Hospital, DMH
16. **Mark Webster** – Vocational Teacher, Northshore Education Consortium

Group 2 (Board Review)

1. **Eileen Kaifer** – Office Support Specialist I, MA Parole Board

On a motion made by Ms. McGoldrick and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Kaifer’s Group 2 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

2. **Cristen Lenard-Detour** – Habilitation Coord. Specialist, Commonwealth Community Svc., DDS

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

3. **Bonnie Spicer** - Clinical Social Worker D, Tewksbury Hospital, DPH

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

4. **Jose Pereira** – Buyer II, DOC

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

5. **Stacey Perry** – Booking and Intake Assistant, Bristol County Sheriff's Office

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

Group 2 Reconsideration (Board Review)

1. **Kristine Proulx** – RN IV, Corrigan Mental Health Center, DMH

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Proulx's request for reconsideration of her classification request due to a lack of new information being provided.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

2. **Stephanie Weston** – LPN II, Chelsea Soldier's Home

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

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

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	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. **Leonie Forbes-Sanderson**

Department of Mental Health

RN II – 10/31/1999- 06/20/2001

2. **Bettina Wallace**

Department of Children and Families

Social Worker I –05/03/1987 - 10/05/1988

Social Worker III – 10/16/1988 - 12/15/01

Social Worker C – 12/16/01 - 07/23/11

Social Worker III – 07/24/11 - 04/01/17

Group 2 Pro-Rate (Board Review)

1. **Kim Carucci**

Chelsea Soldier's Home

LPN I - 9/17/2006 - 09/15/2007

LPN II - 9/16/2007 - 06/22/2019

RNI I - 6/23/2019 - 10/9/2021

RN II - 10/10/2021 - 08/19/2023

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Carucci's Group 2 Pro-Rate classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

2. **Freda Malone**

City of Springfield

Mayoral Aide – 01/06/1992 - 09/11/1993

On a motion made by Mr. Gormley, Jr., and seconded by Ms. McGoldrick, the Board voted to deny Ms. Malone's Group 2 Pro-Rate classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

Group 4

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

1. **Dean Belanger** – Captain, MA Environmental Police
2. **Eric Cambra** - Correction Officer I, DOC
3. **Nicholas Carme** – Correction Officer, Franklin County Sheriff's Office
4. **Peter Cignetti** - Captain, Essex County Sheriff's Department
5. **Nicole DeFrancesco** - Assistant Deputy Superintendent, Plymouth Co. Sheriff's Department
6. **Marc Deschamps** – Correction Officer, DOC
7. **Paul Dineen** - Correction Officer, Norfolk County Sheriff's Office
8. **Christopher Donelan** – Sheriff, Franklin County Sheriff's Office
9. **Christopher Faux** – Assistant Adjutant General, Military Division
10. **David Kitterick** – Correction Officer Corporal, Suffolk County Sheriff's Department
11. **Barbara Maher** - Superintendent IV, Essex County Sheriff's Department
12. **Daniel Menton** – Correction Officer, Plymouth County Sheriff's Department
13. **Joanne Morales** - Assistant Superintendent II, Hampden County Sheriff's Department
14. **Melissa Novicki** - Correction Officer, DOC
15. **Brian St. Pierre** - Environmental Police Officer, MA Environmental Police

16. **Stephen Ryan** – Correction Officer II, Essex County Sheriff's Department
17. **Mark Salvucci** – Correction Officer II, Suffolk County Sheriff's Department
18. **Michael Shea** – Captain, Barnstable County Sheriff's Office
19. **John Tamoosh** - Assistant Deputy Superintendent, Plymouth County Sheriff's Department

Group 4 (Board Review)

1. **Julie Hartling** - Reintegration Coordinator, Essex County Sheriff's Department

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Hartling's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

2. **Keith Kasprzak** – Deputy Police Chief, MA College of Art and Design

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Kasprzak's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

3. **Robert Johnston** – Senior Prison Steward/C.O., Hampden County Sheriff's Office

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Johnston's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Yes
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

Ms. Goldstein exited the meeting at 1:16 p.m.

4. **Tina Kalil** – Shift Supervisor/C.O. II, Hampden County Sheriff's Office

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Ms. Kalil's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

5. **Warren Sampson** – Residential Supervisor IX/C.O., Hampden County Sheriff's Office

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Sampson's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

Group 4 Reconsideration (Board Review)

Joe Eugenio – Correction Officer II, DOC

On a motion made by Ms. McGoldrick, and seconded by Mr. Valeri, the Board voted to reconsider Mr. Eugenio's Group 4 classification request.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to deny Mr. Eugenio's request for Group 4 classification.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

Group 4 CPO (Board Review)

Daniel MacDonald – CPO D, DOC

On a motion made by Ms. McGoldrick, and seconded by Mr. Gormley, Jr., the Board voted to approve Mr. MacDonald's request for Group 4 classification.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	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. **Joe Eugenio**

Department of Correction
Correction Officer II – 07/09/1983 -
09/18/1999

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

Classification:

1. **Dawn Arthurs** – Correction Officer, Barnstable County Sheriff's Office
2. **Danielle Perez** - Correction Officer I, DOC
3. **Patrick Weir** - Lieutenant, Norfolk County Sheriff's Office

TAB 3: REPORT OF THE EXECUTIVE DIRECTOR

Business Operations Report

- Ms. Kougias provided a summary of the proposed Senate Budget Amendment 614, "Retirement Plus", which would allow some Department of Elementary and Secondary Education (DESE) employees to be reinstated into the Teachers' Retirement Board or Boston Retirement Board while working at DESE. Such employees would retire from the MSRB. It would also allow a window of opportunity for those who did not originally elect the Retirement Plus benefit to do so. Senior staff and Treasury Policy staff met with members of the Teachers' and Boston Retirement Boards and all expressed similar concerns, including the significant costs to implement. A joint letter was submitted to Senate Counsel. Ms. Kowtoniuk added that while that section was deleted from the Senate version of the bill, it is still in the House version. She said that they will continue to keep an eye on it as it progresses.
- The COLA Commission has been extended to October 15, 2025. Ms. Kougias said that the purpose of the Commission is to study cost-of-living adjustments for members of the State Employees and State Teachers' Retirement Systems. The Commission is reviewing possible enhancement to the COLA for retirees and related costs and funding.
- There are approximately twenty-five policies pursuant to statutory and legal requirements to effectively administer the State Employees Retirement System. Ms. Kougias said that the Board Policy Committee has been convened to review and update the existing policies. The review will likely take several months followed by presenting to the Board for consideration before finalization.
- The HERO Act has been very successful and has brought a surge of work for the Buyback team. Through May, approximately 900 Military Buyback requests have been received in addition to the non-military applications. Upon receipt an acknowledgement letter is issued. Overtime was authorized to help address the increase in work. Although we would like to be able to send auto-updates to the members, this would require costly modifications to MARIS. Since it is a one-time process that is scheduled to end in August, 2025, it is not feasible to allocate resources at this time. A notification informing members about the longer timeline has been added to the website.

- The Salary Transparency outreach to payroll administrators has generated lots of activity and discussion with agencies. A second outreach effort is being planned for the June/July period.

Board & MSRB Communications

- Ms. Kougias provided a summary of the warrants, accelerated payments and outreach. In-person visitors have been increasing steadily. She said that the number of monthly accelerated payments have been decreasing. With first payments being processed faster, there is less demand for the accelerated payments. Ms. Kougias also said that NFocus has proven to be a helpful telephone management tool. This ultimately improves customer service.

Legal Update

The legal update report was included in the Board materials. It included 7 summaries of recent administrative decisions as follows: Kahn v. SBR, CR-14-524 excess earnings; Mireault v. SRB, CR-17-168, heart law presumption; Fratto v. SRB, CR-24-0372, creditable service; Howard v. SBR, CR-23-0151, Group 2 classification; Crupi v. SBR, CR-25-0003, Group 4 classification; Budness v. SBR, CR-23-0488, accidental disability retirement; Santa v. SBR, CR-23-0413, Group 2 classification.

At **1:32 p.m.**, Ms. Kowtoniuk asked for a motion to adjourn. Ms. McGoldrick made a motion to adjourn and Mr. Gormley, Jr., seconded the motion and the Board voted to adjourn.

ON THE ROLL CALL, THE VOTE WAS AS FOLLOWS:

Mr. Valeri	Yes
Ms. McGoldrick	Yes
Ms. Goldstein	Absent
Mr. Gormley, Jr.	Yes
Ms. Kowtoniuk	Yes

The next meeting of the State Board of Retirement will be held on June 26, 2025 at 10:00 a.m.