

PERAC Pension News

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PERAC Deputy Joe Martin Retires

By John W. Parsons, Esq.
Executive Director

It is with mixed emotions that the Commission acknowledges the June 30, 2020, retirement of Deputy Executive Director Joe Martin.

Joe's retirement marks the end of a remarkable 38-year career of public service in which he leaves an indelible footprint at PERAC and the pension community at large.

Joe began his career in the State Senate as a legislative aide to former Senator Jack Brennan. From there, Joe worked at the PRIM Board as General Counsel and eventually became Deputy Director at PERA, the predecessor to PERAC. In 1987, Joe became the PERA designee to the Contributory Retirement Appeal

Board, or CRAB, where he served as one of three designees for the past 33 years, rendering thousands of decisions shaping pension law and policy.

In Joe's 30 plus years at PERA and PERAC, he has been intricately involved in the establishment and shaping of pension policy in the Commonwealth. Joe's extensive legal and legislative skills are evident in each significant change in Chapter 32, where he was instrumental in protecting first and foremost the contributions and



Joseph Martin, Esq.
Deputy Executive Director

benefits of public employees. While always mindful of the autonomy of retirement boards and the role of the investment community, Joe's analysis began and (continued page 6)

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Pandemic Does Not Stop Disability Unit

By Kate Hogan
Manager of Medical Services

Due to the assistance of Retirement Boards and Employers, PERAC's Disability Unit has been able to continue to schedule medical panel examinations for applicants for disability retirement benefits during the COVID-19 State of Emergency. These new examinations are being conducted entirely remotely, via telemedical examination.

This completely voluntary process was created to enable the disability retirement application process to continue throughout the State of Emergency. All parties – the member applicant, the employer, and the retirement board – have a right to agree or disagree to this process. Documentation of this agreement to attend the examinations via the virtual process was obtained through waivers of attendance, which the Disability

Unit staff provides to applicants. Applicants who agree to the telemedical examination must provide PERAC with a signed waiver.

Physician/Vendor Organizations are required to provide a HIPPA compliant method of performing virtual examinations.

Retirement board staff must obtain the employer's signed waiver and the retirement board's signed waiver, and provide them to PERAC. Upon

receipt of the waivers, PERAC schedules the appointments, and the vendor organization contacts the applicant to assist them in setting up the virtual exam.

We are happy to report that this process has proven to be very successful. Pending the submission of the waivers, we hope to schedule as many appointments as possible until such time as it is determined safe to resume in-person exams. ■

How COVID-19 Impacted Our Scheduling* Due to the State of Emergency:

186 appointments had to be cancelled in March and April. These consisted of both Joint and Single Examinations.

87 appointments were completed via telemedicine exam. Certificates and Narrative Reports were provided to the retirement boards.

43 appointments were scheduled throughout May and June.

109 appointments remain to be scheduled.

* as of June 16, 2020

Irene Triplett The last Civil War pension recipient dies

By Judith Corrigan
General Counsel

I*rene Triplett of North Carolina died on May 31, 2020, at the age of 90. She was the last person receiving a pension from the United States government on account of the U.S. Civil War, which ended in 1865.*

Irene passed away following surgery after she broke her hip. She had lived most of her life in facilities such as nursing homes, suffering from a cognitive disability. She received her monthly pension of \$73.13 from the Veterans' Administration as the "helpless child of a veteran."

Irene has been featured in several of PERAC's educational presentations throughout the years. Although the length of this pension obligation could not be replicated under Chapter 32, Irene's story has nonetheless been instructive about how long pension liability can last. Since her father began receiving his pension in the 1880s, and since Irene just died, this pension obligation spanned three centuries.

Irene's father was Mose Triplett, who first fought for the Confederacy but abandoned his regiment after falling ill before the Battle of Gettysburg and leaving the hospital, becoming a deserter. He joined the Union forces at some point in 1864.

Many years after the war and following the death of his first wife, Mose married his second wife, Elida, in 1924. He was 77, and she was 28. As the Washington Post noted, "Such an age difference wasn't rare, especially later, during the Great Depression, when Civil War veterans found themselves with both a pension and a growing need for care."

Together Mose and Elida had five children, two of whom lived to adulthood. One of those children was Irene, who was born in 1930 when her father was 83. (Irene's younger brother Everette passed away in 1996.)

According to the Wall Street Journal, "Private Triplett died in 1938 at age 92, days after attending a reunion of Civil War veterans, attended by President Franklin Roosevelt, on the fields of Gettysburg." Irene was eight years old at the time.

It's unlikely Irene understood her significance in the public pension world, but all United States

Civil War pension obligations have now concluded. The last surviving Union veteran from the Civil War, Albert Woolson, died in 1956 at the age of 106. Gertrude Janeway, the last Union widow receiving a pension, died in 2003 at the age of 93. (The Janeway pension obligation had also spanned three centuries.)

We will have to find a new individual to help illustrate pension liability and beneficiary issues for us in future presentations, likely someone who is still receiving a pension on account of his or her parent's service in the 1898 Spanish American War. Whether this new person will be as colorful a character as the tobacco chewing, Dr. Pepper drinking Irene, who didn't like to talk about pensions at all, remains to be seen.

Thank you, Irene, for helping the public pension world see pensions from a slightly different perspective. Rest in peace. ■

PERAC Legislative Update

Pandemic-related bills awaiting legislative review

By Bill Keefe
Assistant Deputy Director
of Research, Planning, and Public Affairs

Since the start of the pandemic, the Legislature has passed 13 bills as of this writing relating to the coronavirus outbreak that Governor Baker has signed into law. More will likely follow as over 200 coronavirus-related bills have been filed and the chambers have developed remote meeting and voting methods to continue legislating.

The most significant action is still to come as we await the state budget, which will reveal FY 21 ramifications of the pandemic on items of impact on the public retirement community such as state pension fund contributions, local aid, and Chapter 70 education aid. Much is dependent on the latest federal relief bill being debated in Washington, which may have assistance for state and municipal governments for lost revenue. Already, the state has entered into short-term borrowing to



meet FY 20 needs as a result of the shutdown and the movement of the personal income tax filing deadline to July 15.

PERAC Memo 21 offered guidance on a significant statute to the retirement community, Chapter 53 of the Acts of 2020. Section 14 of that law allows public sector superannuation retirees to work in the public sector during the Governor's declared state of emergency without regard to the normal statutory limitations on earnings and hours worked. The provision does not apply to disability retirees, but it does cover all job functions, not just public safety

or health care. A common question that has arisen is "when does the emergency end?" The Governor will issue a written declaration ending the state of emergency and it will likely be big news, but PERAC will also monitor this and send out notification when it happens. ■

PERAC Staff on the Move

With the June 30, 2020, retirement of longtime Deputy Executive Director Joseph Martin, several PERAC staff will be assuming new roles going forward. ■



Caroline Carcia, who has served as PERAC's Deputy Director of Administration since January 2019 will succeed Mr. Martin as Deputy Executive Director. Caroline has been an integral player at PERAC since its inception in 1996.



Senior Associate General Counsel Patrick Charles has been unanimously appointed by the PERAC Commission to serve as its appointee on the Contributory Retirement Appeal Board (CRAB). Patrick is a worthy successor to Joe's 33 years on the board and his appointment was greeted appreciatively by the Massachusetts Association of Public Pension Attorneys (MAPPA).



Senior Associate General Counsel Ken Hill has been promoted to Assistant Deputy Director and will provide management to the Disability, Fraud Prevention, and CME Units. Ken has been with PERAC for the past 6 years and has seen his role grow steadily during this period. Ken will continue to serve in the PERAC Legal Unit.



Assistant Deputy Director Bill Keefe has assumed additional managerial responsibilities as well, providing management to the Audit, Compliance, and Communications Units. Since joining PERAC last year, Bill has focused on legislation and policy.



Communications Director Natacha Dunker will head up an Education Committee focusing on the substantive curriculum of PERAC's Educational program. Natacha has been with PERAC since 2013 and brings extensive pension and communications experience to this new role.



Remembering Joan Schloss

Former MTRS Executive Director passes away

It is with sadness that we recognize the recent passing of our friend and colleague in the pension community, Joan Schloss. Joan passed away on May 22, 2020 at the age of 68 after bravely and successfully winning over cancer for many years.

Many of you will recall Joan as a longtime leader at the Massachusetts Teachers' Retirement System, first as its General Counsel and later as its Executive Director. In addition to her steady leadership at MTRS, Joan was a recognized expert throughout the pension community at the state and national level. Many of us in the MA pension community benefitted from Joan's mentoring and guidance as a pension attorney and executive.



As a colleague and friend, Joan combined intelligence and professionalism with a warm personality and great sense of humor. For those of us that had the opportunity to work with and befriend Joan, she will be remembered first and foremost as a reliable, considerate friend.

Our thoughts go out to her husband Robert "Bob" DeLena and her extended family. ■

Joe Martin Retires (continued from page 1)

ended with the protection of the employees' rights and the systems' assets. Joe's self-taught knowledge of the complicated investment world, and his uncanny ability to identify vulnerabilities in an investment arrangement, have no doubt saved our retirement systems millions of dollars.

At PERAC, Joe has been a trusted and dependable colleague and dear friend. We will greatly miss his knowledge, wisdom, friendship, and great sense of humor. On behalf of the PERAC Commission, staff, and the pension community at large, we say congratulations, thank you, and sincere wishes of good health and happiness to Joe and his family. ■



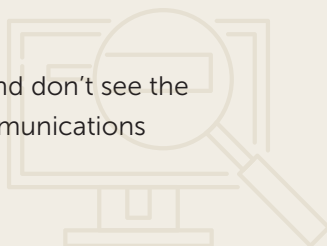
New & Noteworthy

Did you know?

PERAC often posts handouts from educational sessions on our website.

Links to available Educational Materials from past sessions can be found in the *PERAC Education* section of our website.

If you attended a session and don't see the handout, contact our Communications Department for a copy.



Reminder

**Because of the State of
Emergency, the deadline for
disability retirees to submit the
Annual Statements of
Earned Income was extended.**

**2020 Due Date:
July 15th**

Memos released last quarter:

- #13: Updated Forms on the Website**
Updated Beneficiary, Disability, Employer, and General Membership forms were added
- #14: Required Minimum Distribution**
SECURE Act changed RMD age to 72. RMD still required for anyone attaining age 70½ *prior to* 1/1/2020.
- #15: Coronavirus Contingency Planning**
Update to retirement boards re COVID-19
- #16: Coronavirus Update**
Update to Retirement Boards re COVID-19
- #17: Coronavirus Impact**
Changes needed due to State of Emergency
- #18: Mandatory Retirement Board Member Training**
Remote learning schedule announced
- #19: Tobacco Company List**
- #20: Coronavirus Update**
Changes needed due to State of Emergency
- #21: Post Retirement Restrictions During State of Emergency**
Earnings and hours restrictions eased due to COVID-19 State of Emergency
- #22: Delayed FY21 Appropriations**
Information to retirement boards on appropriation payments
- #23: Tobacco Company List**
- #24: PROSPER Security Update**

Upcoming Meetings

August 12, 11:00 a.m.
Commission Meeting

September 9, 11:00 a.m.
Commission Meeting

October 14 11:00 a.m.
Commission Meeting

November 18, Time TBD
Commission Meeting

Meetings are being held remotely unless otherwise noted and are open to the public.

(See our website for information on how to join the meetings remotely)

PERAC

2020 Education Schedule *third quarter*

Credits
board members
must earn

18
per term

3
Minimum
per term year

9
Maximum
per term year

Date: Topics for Upcoming Webinars

July 16 Preparing for Private investments that Turn Choppy

July 20 Open Meeting Law

July 23 Conflict of Interest Law

July 29 Ethical Decision Making: Practicing Your Skills

August 13 Open Meeting Law

August 19 Options on Retirement & Beneficiary Selection

September 17 Emerging Issues Keynote Address

September 23 Post-Retirement Employment and Other FAQ's

See our website for additional educational opportunities and registration information.

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