

STATE OF CONNECTICUT  
STATE EMPLOYEES RETIREMENT COMMISSION  
SUBCOMMITTEE ON PURCHASE OF SERVICE & RELATED MATTERS MEETING

---

MAY 11, 2023 MEETING  
HELD VIA ZOOM  
CONVENED AT 1:04 p.m.

---

Present:

Chairman Peter Adomeit  
Trustee Michael Carey  
Trustee Carl Chisem  
Trustee David Krayeski  
Commission Counsel Cindy Cieslak (Rose Kallor, LLP)  
John Herrington, Retirement Services Division Director  
Colin Newman, Retirement Services Division  
Robert Helfand, Retirement Services Division Assistant Division  
Director  
Patricia Meskers, Retirement Services Division Assistant  
Division Director

TRANSCRIPTIONIST: Karin A. Empson

1 (Proceedings commenced at 1:04 p.m.)

2  
3  
4  
5 CHAIRMAN ADOMEIT: Okay. This is the State  
6 Employees Retirement Commission Purchase of Service and  
7 Related Matters Subcommittee meeting held by  
8 teleconference on May 11<sup>th</sup>, 2023.

9 Cindy, do you have the attendance, please?

10 MS. CIESLAK: Good afternoon. This is Cindy  
11 Cieslak. Present today, we have Chairman Peter  
12 Adomeit; Trustee Michael Carey; Trustee Carl Chisem;  
13 Trustee David Krayeski; from the Retirement Services  
14 Division, John Herrington, Robert Helfand, Colin  
15 Newman, Patricia Meskers; and then myself, Cindy  
16 Cieslak, General Counsel from Rose Kallor.

17 CHAIRMAN ADOMEIT: Okay. We need a motion to  
18 amend the agenda to add James Houlberg. Do we have  
19 such a motion, please?

20 MR. CHISEM: I make a motion to amend the  
21 agenda, James Houlberg.

22 CHAIRMAN ADOMEIT: Thank you, Carl.

23 MR. CAREY: Carey, second.

24 CHAIRMAN ADOMEIT: All in favor, say aye or  
25 raise your hand. Unanimous; the ayes have it.

1           Okay. Item Number 1 on the agenda is Charles  
2           Cleary.

3           MR. NEWMAN: Yes, so this is Colin speaking.  
4           Charles Cleary has been employed with the state  
5           essentially since March of 1991. He, in 1997 - oh, I'm  
6           sorry. In 1991, he was actually working over at the  
7           legislature, and so he was in SERS Tier II. In August  
8           of '97, he transferred to Charter Oak College and  
9           elected to go into the alternate retirement program,  
10          which is a plan that he remained in until he made the  
11          election to transfer into the SERS Tier II hybrid plan  
12          in 2014.

13          So back in - with the 2011 SEBAC agreement,  
14          all SERS Tier II and IIA members were required to make  
15          an election as to whether or not they wanted to retain  
16          the grandfathered normal retirement age of age 60 with  
17          25 years of service, or age 62 with 10 years of  
18          service, or they could make the election to waive that.  
19          Mr. Cleary actually submitted the required form where  
20          he elected to grandfather his retirement age.

21          Unfortunately for Mr. Cleary, he was  
22          ineligible to make that selection because of the fact  
23          that he was in the alternate retirement program and  
24          this only pertained to members of SERS. So in 2014 -  
25          I'm sorry. When he - that election period had to have

1       been completed by on or before July 1 of 2013. So at  
2       that time, he was still a member of ARP, so he was  
3       ineligible to make that election.

4               In 2014, he transferred back in - well, he  
5       transferred into the SERS hybrid, Tier II hybrid plan,  
6       but at no time did he come forward and request the  
7       grandfathered - to be able to grandfather his age. In  
8       fact, we didn't hear about him until March of this  
9       year. His - the Connecticut State Colleges Human  
10      Resource Office, on his behalf, inquired with the  
11      division as to why there were never any grandfathering  
12      deductions taken from him, even though they said that  
13      there was a file - there was a form on file with the  
14      division, and they wanted to know how to go about  
15      correcting this.

16             The division responded that there wasn't  
17      going to be any further corrective action taken as this  
18      was beyond the July 1 of 2020 due date when the new  
19      retirement rules went into effect. He was given - and  
20      additionally, you know, it was pointed out that there  
21      had been a number of years that had passed on this and  
22      he had never come forward before questioning as to why  
23      the deductions were not - he didn't see the deductions  
24      coming out of his check.

25             The division did provide an administrative

1 denial, official administrative denial, which Mr.  
2 Cleary is appealing. You know, his claim is that he  
3 did complete the form in 2013 as required, and he was  
4 basically saying he was never told that he was  
5 ineligible at that time, because he's claiming that he  
6 was never told that he had to complete the form again  
7 at the time when he transferred in 2014.

8 So that is his claim. And what do the  
9 trustees have to say?

10 MR. KRAYESKI: So, Colin, just, if I'm  
11 reading this accurately, the retirement division did in  
12 fact receive the grandfathering form from him-

13 MR. NEWMAN: Right.

14 MR. KRAYESKI: --but apparently, while he was  
15 in ARP; correct?

16 MR. NEWMAN: Correct.

17 MR. KRAYESKI: Okay. All right.

18 CHAIRMAN ADOMEIT: This is David Krayeski  
19 speaking.

20 MR. KRAYESKI: Oh, sorry about that.

21 CHAIRMAN ADOMEIT: Yeah, we're being  
22 recorded.

23 MR. CAREY: So, Colin - this is Mike Carey -  
24 what was the date of return into SERS in 2014?

25 MR. NEWMAN: He actually returned, I believe

1 it was May, May-

2 MR. CAREY: Okay, I see. I'm sorry. I see  
3 it here.

4 MR. NEWMAN: --May 30<sup>th</sup>.

5 MR. CAREY: May 30<sup>th</sup>, 2014.

6 MR. NEWMAN: Right.

7 MR. CAREY: Okay. So basically, he submitted  
8 this form a year ahead of time-

9 MR. NEWMAN: When he was ineligible.

10 MR. CAREY: --when he was ineligible. Let me  
11 ask a question about eligibility. I know from the  
12 record that he had six-plus years in Tier II-

13 MR. NEWMAN: Correct.

14 MR. CAREY: --prior to his move over to ARP.  
15 Would that - at that point in time, would five years  
16 have vested him?

17 MR. NEWMAN: Yes, because he transferred  
18 August 1<sup>st</sup> of 1997.

19 MR. CAREY: So did persons who were vested  
20 have the opportunity - no, they couldn't grandfather  
21 because they can't - they would be paying into it.

22 MR. NEWMAN: Right.

23 MR. CAREY: Okay.

24 MR. NEWMAN: Right.

25 MR. CAREY: So is-

1 MR. NEWMAN: I think the reason why he - the  
2 fact that he had that previous service in Tier II is  
3 what allowed him to go into the - when he transferred  
4 back to SERS and he wanted to go into the hybrid plan.  
5 But he went into the Tier II hybrid plan-

6 MR. CAREY: Right.

7 MR. NEWMAN: --as opposed to Tier IIA.

8 MR. CAREY: And at that point in time, when  
9 he transferred back in, he would have been eligible to  
10 make the grandfathering election?

11 MR. NEWMAN: Yes, yes, yes. He would have -  
12 he certainly would have - yes, he would have been  
13 allowed because I actually had put a document in  
14 another case that's similar to this that the individual  
15 submitted where, you know, we had actually put a  
16 memorandum out. I'm not sure if we put it out in 2014  
17 or 2015, but he would have been eligible to again  
18 request for the grandfathering, for the opportunity to  
19 grandfather.

20 I mean, his argument is that he did it once  
21 and nobody ever told him that, yeah, that he was  
22 ineligible to (inaudible).

23 MR. CAREY: Is there any evidence to support  
24 that he had received communication to indicate that he  
25 was not eligible in June of 2013?

1 MR. NEWMAN: From what I could see, and I  
2 don't know if any of the other staff members knows or  
3 not that, but from what I could see, I didn't see any  
4 documentation related that the division took any action  
5 on that notice. And it was - and probably because of  
6 the fact that - well, I'm making an assumption about,  
7 you know, 10 years ago - that it was - you know, when  
8 it came in and it was seen that he was in a different  
9 retirement plan and that it was - and so they - they  
10 just didn't take any action on it.

11 MR. CAREY: And what about - and I realize a  
12 lot of time has passed and that it would have been  
13 taken out of his check and that apparently went  
14 unnoticed-

15 MR. NEWMAN: Right.

16 MR. CAREY: --but I'm wondering about the  
17 protocols for an employee, in this situation, coming  
18 back. You know, at the time in 2014 when he did come  
19 back into SERS, is there any documentation to support  
20 that he was informed that he could elect to grandfather  
21 at that point?

22 MR. NEWMAN: Um, I don't - I don't believe  
23 there is. Because I think the - I'm going to say, I  
24 think the focus was that when people were transferring  
25 into SERS, it was more about the transferring of the

1 moneys, and nobody - I don't think anybody was taking  
2 into account that they could - that they should be  
3 informing people that they could also grandfather,  
4 which we did do that. I'm going to say it was at a  
5 later date, which - just bear with me for a minute  
6 because I think the document is in another claim.

7 MS. MESKERS: It is. This is Patty Meskers.  
8 It's the new CO-1015.

9 MR. NEWMAN: Right.

10 MS. MESKERS: And it was dated April of 2015.

11 MR. NEWMAN: You're right. Right.

12 MS. MESKERS: And it does address the hybrid  
13 transfer on that form.

14 MR. NEWMAN: Right. And so - and that was a  
15 memorandum that went out to all the agencies. And I  
16 believe it was - was it the notice that went to the  
17 individuals?

18 Which case was that in, Patty?

19 MS. MESKERS: This is Patty Meskers. It's in  
20 the Wardell (phonetic) - Wardwell, excuse me. So I  
21 think it's like eighth from the last, eight pages.

22 MR. CAREY: And, Colin, this is Mike Carey  
23 again. Does Mr. Cleary understand that were we to look  
24 favorably upon this request, he'd be on the hook for  
25 grandfathering payments back to May 30<sup>th</sup> of 2014?

1 MR. NEWMAN: Is - John or Bert are on the  
2 call. I don't know because I'm not familiar - I  
3 haven't spoken to this individual. And I believe he  
4 may have been informed that if he had, he would have  
5 had to have paid all the contributions going back to  
6 2013.

7 MR. HERRINGTON: Yeah, this is John  
8 Herrington. I haven't had any conversations with this  
9 gentleman; however, Jean Reid has, and that that's part  
10 of her standard spiel.

11 MR. NEWMAN: Yeah, I haven't spoken to him  
12 either.

13 MR. KRAYESKI: I just - David Krayeski -  
14 really just want to - I'm sorry, Carl. Just one quick  
15 question. Is he still an active employee?

16 MR. NEWMAN: Yes, he is.

17 MR. KRAYESKI: Okay, thank you.

18 MR. NEWMAN: Yeah, I think the whole - the  
19 reason why this has come forward, because he apparently  
20 is looking to retire at some point this year.

21 MR. CHISEM: Yeah, Carl Chisem. That was my  
22 question. So he's - Colin, he's assuming that when he  
23 put the paperwork in and then when he came over to  
24 SERS, that that should have automatically followed with  
25 him; correct; and that somebody should have picked it

1 up?

2 MR. HERRINGTON: That would seem like an odd  
3 assumption. I mean, unless he knew that he was  
4 transferring to ARP at that time.

5 MR. CHISEM: Oh, it was a year prior; right?

6 MR. HERRINGTON: Right, yep.

7 MR. NEWMAN: It was - right, right.

8 MR. CHISEM: All right.

9 MS. MESKERS: This is Patty Meskers again. I  
10 believe he thinks he may lose his position on May 31<sup>st</sup>.  
11 So that's why he was looking into it now. And he did  
12 ask what the details of the final math calculation may  
13 be in his appeal.

14 MR. CAREY: Thank you, Patty. This is Mike  
15 Carey. And also, he does turn 60 in early July of this  
16 year.

17 MR. NEWMAN: Right.

18 MR. CAREY: So this is Mike Carey again. I  
19 guess I'd ask of the division, how unusual is this  
20 particular fact pattern?

21 MR. HERRINGTON: I would say that it's  
22 extremely unusual, right, the idea that someone  
23 submitted a grandfathering application while in ARP and  
24 then subsequently transferred. Those facts are  
25 unusual. What I would say is that my understanding is

1 that the ARP-to-hybrid process kind of evolved over  
2 time and, you know, there was a certain period of time  
3 where there would be no question that someone would  
4 have been afforded the opportunity to grandfather  
5 immediately upon transferring. This transfer wasn't  
6 the earliest, but it was somewhat early on.

7 I would also say that, you know, paying those  
8 grandfathered contributions now, this far after the  
9 point, it won't come close to capturing what the real  
10 cost is, the real cost of the plan.

11 MR. NEWMAN: Because of the change in the  
12 retirement?

13 MR. HERRINGTON: Right, that, and I mean,  
14 whenever I talk to John Garrett about the  
15 grandfathering, the use of a universal factor across  
16 the board for all of the populations, that that wasn't  
17 capturing the full grandfathering cost, the full  
18 actuarial cost of the change in eligibility.

19 MR. CHISEM: I have a question. Carl Chisem.  
20 I don't know if it's for John or Colin. Was there any  
21 time - you know, I know the time was 2013, when  
22 everybody had to hand it in, and there was a cutoff  
23 time, a cutoff period. Was there any time after it  
24 lapsed that people could have jumped in, or that was  
25 just a deadline, period, and that's it?

1 MR. HERRINGTON: Right, yeah, that was the  
2 deadline.

3 MR. NEWMAN: That was the deadline, yeah.

4 MR. HERRINGTON: And we've enforced that  
5 deadline.

6 MR. CHISEM: So there wasn't anybody after  
7 that that got in?

8 MR. HERRINGTON: Correct. The only people  
9 that got in after that were people that were not  
10 employed during that time and returned to state  
11 service, or other individuals who were in ARP  
12 previously and then subsequently transferred via the  
13 ARP-to-hybrid, or the SAG.

14 MR. CHISEM: Okay, thank you.

15 CHAIRMAN ADOMEIT: How do you wish to  
16 proceed?

17 MR. CAREY: This is Mike Carey. I'm not  
18 particularly sure. This is a very unusual fact  
19 pattern, I think. And I don't - I'm not feeling that  
20 the matter is clearcut.

21 MR. KRAYESKI: This is David Kraveski. And I  
22 just spent a couple of minutes reading through the  
23 employee's letter. I can't fully determine from here  
24 that he believes he is responsible for the payment. It  
25 does seem as though he believes it's the agency's error

1 and they might be responsible for paying the amount,  
2 which is a little concerning as well.

3 Can we have the (inaudible)?

4 CHAIRMAN ADOMEIT: What would that amount be?

5 MR. KRAYESKI: I'm sorry. This is David  
6 Krayeski again. Sorry, Peter.

7 CHAIRMAN ADOMEIT: Yeah, go ahead.

8 MR. KRAYESKI: Do we have a calculation on  
9 how much is owed or not?

10 MR. NEWMAN: It's not in this packet. If  
11 it's not in this packet, I'm not sure if a calculation  
12 was done due to the fact that the division had made the  
13 determination that, you know, he was ineligible.

14 MR. CAREY: This is Mike Carey. The issue of  
15 who pays aside, I think the threshold question is,  
16 would he be allowed to make that election. I would not  
17 be sympathetic to anybody other than him making the  
18 payments. But, you know, the threshold question, I  
19 think, for us is, should he be allowed to basically  
20 have that option now to make the payments, yay or nay.

21 MR. HERRINGTON: From my perspective, the  
22 whole issue is the completion of the form prior to  
23 this; right? We've had a number of individuals and we  
24 continue to get individuals that come forward now that  
25 may or may not be able to establish that they submitted

1 the paperwork on time, and we will, you know, pretty  
2 routinely get emails from agencies that are, you know,  
3 some version of, I don't recall and I can't find any  
4 record of us notifying this individual, and we get  
5 those pretty common.

6 And I would say, on those facts, I would feel  
7 pretty strongly that we should deny someone who for 10  
8 years hasn't followed up with this, and on the eve of  
9 retirement, comes forward. To me, I guess, it's, you  
10 know, what do we make of the fact that when he was  
11 ineligible, he submitted a form.

12 MR. CAREY: So, John - this is Mike. At what  
13 point in time were the ARP II hybrid issues being  
14 discussed? I'm stretching probably, but I'm curious as  
15 to whether or not in June of 2013, if, you know, being  
16 aware that this was in the offing, he may have - well,  
17 first of all, he did file it. But I'm wondering if he  
18 filed it looking ahead to-

19 MR. HERRINGTON: And thinking that he was  
20 going to, right, yeah.

21 MR. CAREY: --that he was going to.

22 MR. NEWMAN: This is Colin. Well, this ARP-  
23 to-hybrid, you know, it was part of the SEBAC, the  
24 SEBAC 2011 agreement. So I believe it was like the  
25 following year that we started that process in place.

1 And then it was in 2013, I believe the beginning of  
2 2013, when we were beginning the process regarding the  
3 grandfathering. And so he may have - I don't know if  
4 his CO - I don't know - I don't believe I have a copy  
5 of his CO-994 from back then as to when he actually was  
6 - he actually did the transfer in 2014, or did the  
7 paperwork in 2014 because of - and this was after he  
8 had received like an estimate of what it was going to  
9 cost. It was - so he may have started the process, but  
10 he didn't actually do the actual transfer.

11 (Inaudible) elected to go into the Tier II  
12 hybrid plan for May of 2014. I believe he made the  
13 payment to transfer his prior service, his prior ARP  
14 service, like after that date because he was able to  
15 transfer into the plan and then complete the transfer  
16 of the cost to bring his prior service over after that.

17 MR. HERRINGTON: Yeah, he completed the CO-  
18 994 on June 16<sup>th</sup> of '14. So he elected to transfer on  
19 June 16<sup>th</sup> of '14.

20 MR. CAREY: This is Mike again. I think I  
21 have one last question. Do we have any other cases  
22 where somebody filed the grandfathering request when  
23 they were not eligible and then subsequently became  
24 eligible and we said, whoop, we've got this on file, so  
25 now we can start the deductions as requested?

1 MR. NEWMAN: This is Colin. As far as I  
2 know, this was the first one that I was aware of where  
3 people had actually completed the form, but were  
4 ineligible because they were in a different retirement  
5 plan, that I'm aware of. I'm not sure if the division  
6 had received those - received them from other  
7 individuals, but this case was the first time that I  
8 had - that I was aware of.

9 This is Colin again. It was just interesting  
10 that like on today's agenda, we've got three cases that  
11 are similar, you know. It's like they all at once-

12 MR. CAREY: Yeah. I guess I'd be interested  
13 to hear what the other trustees have to say given this  
14 highly irregular fact pattern, and the fact that he did  
15 file the original request in 2013. I would list  
16 slightly toward agreeing to grant the request. But I'm  
17 open to being discouraged.

18 MR. KRAYESKI: This is Dave Kraveski. I'm  
19 somewhat sympathetic as well simply because he did  
20 follow through on submitting the form. And whether  
21 there was a verbal discussion with his HR office or  
22 something like that, we'd never know, but the form was  
23 received, it was received by the appropriate body and  
24 in the appropriate timeframe, and we did not  
25 necessarily send anything back to him to let him know

1 that it was not necessarily legitimate.

2 And we would only be granting him the ability  
3 to pay for it, which he would have had to have paid for  
4 all along. So with that, I would be sympathetic  
5 towards approving it.

6 MR. CHISEM: This is Carl Chisem. I'm  
7 inclined to approve it because, you know, it was - the  
8 paperwork was sent prior to all of this. I'm not sure  
9 how the payment should be or not. I'm unclear about  
10 that right now.

11 MR. CAREY: So this is Mike Carey. Is the  
12 practice to take motions as the cases proceed, or to  
13 take all motions at the end?

14 CHAIRMAN ADOMEIT: We can do whatever we  
15 want. Usually we do it seriatim, but if you want to  
16 hear the other cases that are similar to this, we can  
17 just move over, hold this in abeyance, and move over to  
18 the next case. Excuse me.

19 MR. CAREY: This is Mike. I would say, let's  
20 do that.

21 CHAIRMAN ADOMEIT: Okay. And what are the  
22 next comparable cases, Colin?

23 MS. CIESLAK: Colin, you are muted.

24 MR. NEWMAN: Sorry, I've got - they're  
25 cutting down trees in my (inaudible). Sorry about the

1 background noise.

2 CHAIRMAN ADOMEIT: That's what that noise  
3 was.

4 MR. NEWMAN: Yeah. The next similar case  
5 would be Evelyn Silva.

6 CHAIRMAN ADOMEIT: All right. So let's move  
7 on to that one then. Go ahead, Colin.

8 MR. NEWMAN: Okay. So Evelyn Silva was a  
9 fulltime employee - or is a fulltime employee with  
10 DEEP. In August of 2013, the division received the  
11 required form for grandfathering. It was received on  
12 August 20<sup>th</sup> of 2013. However, this was another one  
13 where there was no action was taken on the form because  
14 of the fact that she actually signed the form on August  
15 14<sup>th</sup>, which is beyond the deadline date of July 1 of  
16 2013. And it was clear from the memorandum, as John  
17 said, we've always held firm that the deadline date for  
18 this form to have been signed by would have been July 1  
19 of 2013.

20 She is another one where nothing was said,  
21 there was never any inquiry, until October of this year  
22 - I'm sorry, October of last year, when the division  
23 got an email from her payroll office and, I guess,  
24 inquiring as to why no deduction had ever been taken  
25 from her. So the payroll office made the assumption

1 that they, or within their agency, had not forwarded  
2 the form to us in the first place, and asked if there  
3 was anything we could do.

4 The division actually responded and told the  
5 agency, yes, that we would permit it, we would permit  
6 the purchase. And so later on in November of 2022, we  
7 basically told the agency that we were going to  
8 commence taking the deduction and that she also would  
9 have to pay an additional \$4,371.15 for the  
10 contributions that had not been paid from July of 2013  
11 through November of 2022.

12 So Ms. Silva actually took the action of  
13 filing a grievance because she didn't agree with the  
14 amount that she would have to pay back, and the union  
15 based - her grievance was that she wanted the amount to  
16 be recalculated and basically the amount only be based  
17 on five years instead of the nine-plus years, and that  
18 she'd be given five years in which to pay the amount  
19 back.

20 In January of this year, we wrote - the  
21 division wrote to her and basically said that we were  
22 in error in permitting the purchase, and due to the  
23 reasons that were as I listed them, the fact that, one,  
24 she had signed - the form had been signed beyond the  
25 July 1, 2013 deadline date; two, the fact that only

1 after nine-and-a-half years did she notice that there  
2 weren't any deductions coming out of her check; and she  
3 only went to her agency in October of last year. So  
4 for those reasons, we stated that she was ineligible to  
5 make the purchase.

6 And additionally, you know, we informed her  
7 that now there were new normal retirement rules in  
8 place as of July 1 of 2022, and essentially the  
9 retirement fund would not be made whole as it was  
10 basically deprived of any investment income that those  
11 contributions, if they had been in the system, would  
12 have generated.

13 She's appealing the decision. She believes  
14 that the agency didn't submit the paperwork to us, but  
15 the record showed that we did have the form, we did  
16 receive the form, because we received it on, like I  
17 said, August 2<sup>nd</sup> of - I'm sorry, August 20<sup>th</sup> of 2013.  
18 So, you know, her appeal is basically that she thinks  
19 there was an agency error, but the fact of the matter  
20 is, she never signed the form until August, August of  
21 2013, and the agency signed it like a week later and  
22 sent it in.

23 MR. CAREY: And so, Colin - this is Mike  
24 Carey - even if the agency had sent it the same day she  
25 signed it, it still would have been late; correct?

1           MR. NEWMAN: It still would have been late  
2 because, yeah, she didn't sign it - she signed it after  
3 July 1, 2013.

4           MR. CAREY: For what it's worth, my take is  
5 she missed the deadline and that's kind of the end of  
6 it.

7           MR. KRAYESKI: This is David Kraveski. I  
8 agree with that, Michael.

9           MR. CHISEM: This is Carl Chisem. Did the  
10 agency - did she get the indication that the agency  
11 says, you know, sign it, put it in, and let's see what  
12 happens? I don't know the woman or anything.

13          MR. HERRINGTON: That's what I - this is John  
14 Herrington. That's what I would say is difficult with  
15 these situations. So first, I view any, you know,  
16 grandfathering request, you know, that's years after  
17 the fact with some suspicion. I view them more so  
18 after we've passed that July of 2022 date because prior  
19 to that, you know, it's kind of a gamble whether you're  
20 grandfathered or not, because if you're grandfathered  
21 and you retire prior to that point, you wouldn't have  
22 any benefit of that grandfathering; right?

23                 But after that, now everyone knows that there  
24 is absolutely a benefit to you for grandfathering if  
25 you work beyond that.

1 MR. CHISEM: Oh, yeah.

2 MR. HERRINGTON: But the other issue that I  
3 have is the further and further we get away with this,  
4 and I'm sure, you know, everyone on the commission has  
5 seen this, you know, there's just been so much  
6 turnover, it's rare now that whoever actually assisted  
7 this person in 2013 is there or, you know, we have  
8 access to the records to, you know, clarify those kinds  
9 of points.

10 MR. CHISEM: (Inaudible) This one here is  
11 kind of unique because it's a pretty big benefit, and  
12 the only reason I asked is because I know, you know,  
13 you go to some agencies or something and they say,  
14 well, you know what; let's just put it in anyway and go  
15 through it and nobody thought about it after; but most  
16 people do look at their check every week.

17 MR. HERRINGTON: Right. But I would say,  
18 even in that case, right, I mean, so I think that we've  
19 seen a theme here that historically the division wasn't  
20 really good at writing letters; right? I mean, in both  
21 of those instances, we should have said, you know,  
22 you're in ARP, you don't get this; or it's past the  
23 deadline, you don't get this.

24 MR. NEWMAN: The deadline, right.

25 MR. HERRINGTON: But I don't think that, you

1 know, someone that misses a deadline, our failure to  
2 send them a letter that they missed a deadline  
3 justifies some relief.

4 MR. CHISEM: I'm glad you said the, you know,  
5 weren't good at writing letters, John. Thank you.

6 MR. HERRINGTON: Yeah, yeah, yeah, yeah.

7 MR. HELFAND: I think the last letter was  
8 pretty good.

9 CHAIRMAN ADOMEIT: So are we ready to vote on  
10 making a recommendation to the commission on this case,  
11 Silva?

12 MR. CAREY: I'd be glad to make a motion, Mr.  
13 Chairman. This is Mike Carey. Regarding the Silva  
14 matter, I move that we recommend the commission deny  
15 her request to purchase her grandfathered normal  
16 retirement date.

17 MR. CHISEM: Yeah, unfortunately, she was  
18 late, so I do second it.

19 CHAIRMAN ADOMEIT: That was Carl Chisem.

20 MR. CHISEM: Carl - I'm sorry, Chisem.

21 CHAIRMAN ADOMEIT: Yeah, okay. All in favor,  
22 say aye or raise your hand. It's unanimous, I believe.  
23 The ayes have it.

24 Okay.

25 MR. NEWMAN: This is Colin. Do you want me

1 to go to the third case-

2 CHAIRMAN ADOMEIT: Yes, please.

3 MR. NEWMAN: --that's somewhat similar to  
4 that?

5 CHAIRMAN ADOMEIT: Yes, Lisa Loeser.

6 MR. NEWMAN: No, that would be Elizabeth  
7 Wardwell.

8 CHAIRMAN ADOMEIT: Oh, okay, at the bottom.  
9 Go ahead.

10 MR. NEWMAN: Elizabeth Wardwell is an  
11 individual that, since she became employed in April of  
12 2006, she moved around quite a bit, and when she  
13 separated from state service with a vested rights  
14 retirement in September of 2015, she was at Central.  
15 During the time that she was - oh, I'm sorry. And then  
16 she just recently came back into state service. She's  
17 now with the Department of Education starting August of  
18 last year.

19 During the time of the - when grandfathering,  
20 she was employed with the Department of Insurance. So  
21 in October of last year, the Department of Education  
22 emailed the division indicating that Ms. Wardwell had  
23 never received the opportunity to retain her  
24 grandfathered normal retirement date. And they  
25 submitted the form that was signed, which she actually

1 signed in September of 2022. And, yeah, like I said,  
2 this was where we had updated the form to include  
3 individuals who either had been transferred from ARP to  
4 SERS or for individuals who, like John said, were not  
5 employed at the time, but returned to state employment.

6 Ms. Wardwell's issue is that she - like I  
7 said, she claimed that the agency - she was never given  
8 the opportunity to grandfather and she was never made  
9 aware of it. The agency - the division reached out to  
10 the agency and the agency responded by showing emails  
11 that went out to their employees who were eligible for  
12 this, and from the list of employees, her name - she  
13 was one of the individuals that was listed as receiving  
14 the email.

15 So she has indicated that - a couple of  
16 things that she's claiming is that she states that it  
17 went to an old address, which she actually did a change  
18 of address six months after the fact. And then also  
19 she has indicated that she was dealing with a family  
20 tragedy right at the time when the grandfathering had  
21 to be elected. So her claim is that - two things, is  
22 that she believes the agency was in error because they  
23 never - she was never informed of it, which has been  
24 refuted, and her other claim is that she was dealing  
25 with an extraordinary circumstance of a family tragedy

1 right during that period of time, and that's the reason  
2 why she never took any action.

3 CHAIRMAN ADOMEIT: Mr. Carey.

4 MR. CAREY: So, Colin, this is Mike Carey.  
5 Given that you have clear evidence that while she was  
6 employed at the Department of Insurance that she was  
7 specifically notified via email-

8 MR. NEWMAN: Mm-hmm.

9 MR. CAREY: --I'm also going to go out on a  
10 limb and say there were probably other employees with  
11 the Department of Insurance who did indeed opt to  
12 grandfather?

13 MR. NEWMAN: Probably, if we looked back  
14 (inaudible) guess, yeah.

15 MR. CAREY: So given that, while sympathetic,  
16 I think she missed her chance to opt in during her  
17 period of employment. I would be inclined to deny the  
18 request. That's not a motion. That's I want to know  
19 what other people think.

20 MR. KRAYESKI: This is Dave Krayeski. So I  
21 think the agency sent out more than one notice-

22 MR. NEWMAN: Right.

23 MR. KRAYESKI: --which may or may not have  
24 come at an inopportune time in life. And I would have  
25 to say that the opportunity to enroll in grandfathering

1 was in fact put out quite well and numerous times. And  
2 I too would be inclined in denying her request given  
3 the fact that we can find her on an email that went  
4 out. So-

5 MR. CHISEM: Carl Chisem. Quick question,  
6 Colin. I don't know if you know this. Do they have a  
7 State of Connecticut email, or is this a private one  
8 that she's saying that she changed?

9 MR. NEWMAN: Are you asking if it went to her  
10 State of Connecticut email?

11 MR. CHISEM: Yeah. I would imagine that she  
12 has a - being in that position, she does; right?

13 MR. NEWMAN: Right, oh, yeah, because she was  
14 a - I think she was like an executive secretary. She  
15 was (inaudible).

16 MR. CHISEM: So she had to have gotten it  
17 somehow or another.

18 MR. NEWMAN: Right. Yeah, she got  
19 (inaudible).

20 MR. CHISEM: All right. Thank you.

21 MR. CAREY: So then Mr. Chairman - this is  
22 Mike Carey - I would move that we recommend that the  
23 commission deny Ms. Wardwell's request that she be  
24 allowed to retain the grandfathered normal retirement  
25 date.

1 MR. CHISEM: Carl Chisem. I'll second.

2 CHAIRMAN ADOMEIT: Any further discussion?  
3 Hearing none, all in favor, say aye or raise your hand.  
4 Opposed, nay or raise your hand. It's unanimous;  
5 motion carries.

6 Okay. You want to revisit Charles Cleary at  
7 this point?

8 MR. CAREY: Sure. I will move that - this is  
9 Mike Carey - that given the very unique fact pattern of  
10 this case, including that Mr. Cleary filed the CO-1094  
11 in June of 2013, I would move we recommend that the  
12 commission grant his request to retain the  
13 grandfathered normal retirement date and make all  
14 appropriate payments.

15 MR. CHISEM: I'll second that. Carl Chisem.

16 CHAIRMAN ADOMEIT: Any further discussion?  
17 Hearing none, all in favor, say aye or raise your hand.  
18 It's unanimous; the ayes have it.

19 MR. NEWMAN: Okay.

20 CHAIRMAN ADOMEIT: Well, I'm just taking a  
21 note here.

22 Okay, Danielle Kyer. Mr. Newman.

23 MR. NEWMAN: So Danielle Kyer essentially is  
24 a new - relatively new employee, started with the state  
25 working with the Department of Mental Health and

1     Addiction Services in December of '21. She completed  
2     the CO-991 retirement credit purchase request form  
3     indicating that she wanted to be able to purchase  
4     retirement credit for her prior federal employment, the  
5     four years that she had with the federal government.  
6     She was issued a denial of the application based on the  
7     fact there are no provisions within SERS, certainly not  
8     - certainly within the Tier IV plan provisions, that  
9     allow an individual to get retirement credit for prior  
10    federal time. She essentially doesn't agree with that  
11    and that is the reason why she's appealing it.

12           CHAIRMAN ADOMEIT: Comment first, and motion  
13    second in this recording.

14           MR. CAREY: This is Mike Carey. I'd put the  
15    motion first.

16           MR. HERRINGTON: We sent a letter in this  
17    case.

18           MR. NEWMAN: Right, yes. I actually did  
19    speak to her also after she - after we had sent the  
20    letter, and she said-

21           MR. CAREY: So Mr. Chairman, this is Mike  
22    Carey, and I would move that, given that the division  
23    is unable to grant the purchase request of retirement  
24    credit for Ms. Kyer's prior federal employment, that we  
25    recommend that the commission deny Ms. Kyer's request.

1 MR. CHISEM: Carl Chisem, I can second that.

2 CHAIRMAN ADOMEIT: Any further discussion?

3 Hearing none, all in favor, say aye or raise your hand.  
4 It's unanimous; the ayes have it.

5 Okay. Lisa Loeser, Looser (phonetic), Lesser  
6 (phonetic).

7 MR. NEWMAN: Lisa - I didn't want to - yeah,  
8 this is Colin. I didn't want to call her Loser  
9 (phonetic). Lisa Loeser is an individual that is  
10 retired effective January 1<sup>st</sup> of this year. She retired  
11 with approximately 17 years and seven months of  
12 service. Her application, everything was completed in  
13 December, and she, you know, elected to receive a  
14 voluntary retirement, early retirement benefit.

15 She was put on the payroll timely and has  
16 been receiving her monthly benefit ever since. Ms.  
17 Loeser emailed the division in March of this year.  
18 From what she was saying in the email, it appears that  
19 she wanted to change her type of retirement from that -  
20 from a voluntary benefit to one of disability. She was  
21 sent an email on March 15<sup>th</sup> administratively denying  
22 that request, basically that the administrative process  
23 had been brought to closure once her benefit had  
24 commenced.

25 Ms. Loeser, she had written in her email that

1 she had been suffering with a long-term illness, and  
2 because of that, she knew she had to retire. She was  
3 claiming that she repeatedly asked her HR office  
4 regarding what her options were. She's claiming that  
5 she was informed that filing for disability was not an  
6 option and that nothing more could be done for her.

7 The division reached out to her agency  
8 regarding her claim, and they responded by basically  
9 stating that she never inquired or attempted to get  
10 information regarding disability retirement, and  
11 therefore she was never told that it was never an  
12 option. And the fact is that what she was asking about  
13 was short-term disability, which they advised her that,  
14 because she had not signed up for supplemental benefit  
15 - oh, she had not signed up for this particular  
16 supplemental benefit.

17 Because, you know, we had sent the  
18 administrative denial, and she requested for it to be  
19 looked into further, we moved it to the agenda of this  
20 subcommittee.

21 MR. CAREY: Mr. Chairman, this is Mike Carey.  
22 If you're having déjà vu, it's because we talked about  
23 a similar case in the recent Legal & Personnel  
24 Subcommittee meeting. And I brought up in that meeting  
25 that, you know, I had a procedural question. The fact

1 patterns are very similar, where an individual opted  
2 for regular retirement, and then within 24 months  
3 following the commencement of that regular retirement,  
4 they came forward to say, well, what I really want is a  
5 disability retirement. And I think the fundamental  
6 question really is, you know, is that legally proper.

7 So in other words, when we have an individual  
8 who separates for any other reason, they have 24 months  
9 to file for a disability retirement. You know, but for  
10 her having applied for regular retirement, and that is  
11 significant - I don't - you know, I don't dismiss that  
12 at all - but for that, she would have been able to  
13 apply for a disability retirement right now.

14 So I don't know if that's something that  
15 really is before this committee, or if that fundamental  
16 question requires some legal review so that we can look  
17 at, you know, similarly situated case files in a  
18 consistent fashion.

19 MR. HERRINGTON: This is John Herrington.  
20 And it's unfortunate because I need to drop for a 2:00  
21 meeting with the comptroller. But I think one issue to  
22 consider in that analysis is that the idea that the  
23 person has made an option election choice and whether  
24 that subsequent retirement or that subsequent  
25 retirement change, whether that gives the individual an

1 opportunity to change that option choice. And I think  
2 that there are some facts relating to the case that  
3 were just discussed at the Legal & Personnel  
4 Subcommittee that may - that might be an issue. But  
5 I'm getting pinged right now, so I absolutely have to  
6 drop off. I'm sorry.

7 MR. CAREY: So I guess my take on that,  
8 depending upon how others feel, would be that maybe we  
9 table this case so that we can look at the legal issues  
10 regarding the two cases, this one and the one that had  
11 come before Legal & Personnel, and sort of look at them  
12 together, understanding that there may be some  
13 variation in the specific facts.

14 MR. KRAYESKI: This is Dave Kraveski. You  
15 know, having dealt with employees many times doing  
16 retirement applications, the form does have the ability  
17 for someone to access her regular retirement pending a  
18 disability. That's clearly stated right on the form,  
19 and I can only attest for, you know, having done  
20 retirement counseling back when HR people in the field  
21 used to do those things. Patty's nodding; Michael's  
22 nodding.

23 You know, that was a discussion we would have  
24 with an employee. And so it's difficult for me in this  
25 instance not knowing how it's being done today to

1 attest to whether or not those conversations are  
2 happening in the same fashion they once were.

3 But that, you know, there's actually a place  
4 existing on the form to initiate that type of inquiry  
5 and discussion with an employee. And so I just put  
6 that out there for context, that it's not a complete  
7 vacuum, regular retirements, where we have these  
8 conversations with employees.

9 MS. MESKERS: This is Patty Meskers. Oh, I'm  
10 sorry. I just wanted to say, this case is Board of  
11 Regents, so it's not an in-scope agency. So I believe  
12 they do still have more in-person contact, just for  
13 context here.

14 MR. CHISEM: This is Carl Chisem. Only  
15 because I'm learning about the procedure and waiting 24  
16 months to be able to change, or a possibility of that,  
17 I would be more inclined to have it go to legal,  
18 Personnel & Legal.

19 MR. CAREY: So, Carl, if you want to move to  
20 table it for that specific purpose, then I would second  
21 that motion.

22 MR. CHISEM: Okay. This is Carl Chisem. I'd  
23 like to table Lisa Loeser, Leeser (phonetic), Lesser  
24 (phonetic) - I don't want to say Loser (phonetic) - I  
25 make a motion to table it.

1 MR. CAREY: This is Carey. Second, with the  
2 understanding it'll be referred to Legal & Personnel.

3 CHAIRMAN ADOMEIT: Okay. All in favor, say  
4 aye or raise your hand. It's unanimous; the ayes have  
5 it. Okay. Next meeting of Legal & Personnel, Cindy,  
6 add this one to the calendar, please.

7 Okay, next one is Stegeman.

8 MR. HELFAND: Colin, you're muted again.

9 MR. NEWMAN: Yeah, Cindy had to mute me  
10 because they went back to work cutting the trees down.

11 Yeah, this is Colin. Gregory Stegeman, or G.  
12 Scott Stegeman, became employed in November of 2008  
13 with the state police. He's not a trooper, but he was  
14 - I think he's like an IT type of employee. Anyway,  
15 that's the reason why he was placed in the Tier IIA  
16 plan. He's not hazardous duty. When he was hired, he  
17 completed the - at that time, it was the CO-1088 form.  
18 He signed it in a timely manner, as he was attempting  
19 to purchase his prior military service from February of  
20 '02 through April of '04.

21 Unfortunately, at that particular time, that  
22 period of military service actually was ineligible, and  
23 it was only after the federal government changed the  
24 dates for eligible periods of war that that period of  
25 time became eligible, which is the reason why the

1 division processed his request and sent him a purchase  
2 invoice in February of 2010, giving him the option of  
3 either paying in lump sum or through payroll deduction.

4           There's no record on file that there was any  
5 response from Mr. Stegeman. As such, in June of 2012,  
6 he was sent a last-chance opportunity letter, and  
7 basically the letter had the clear instructions that if  
8 he failed to respond to the letter and any subsequent  
9 invoice, that his file would be closed, and that there  
10 may not be another opportunity for him to obtain the  
11 credit in future.

12           Mr. Stegeman didn't come forward until June  
13 of 2019, where he indicated in an email that he had  
14 gone to his HR office to inquire about his prior  
15 military purchase application, and they informed him  
16 that he had missed the opportunity, and they actually  
17 gave him copies of the documentation explaining why.  
18 He's claiming that he was never advised - basically  
19 he's claiming that when he was first hired, he was  
20 never informed that he actually could purchase his  
21 military service.

22           He is claiming that he just - basically it  
23 was like, sign this form; sign this form; but he's  
24 saying that he was never told that he could actually  
25 purchase the time. And additionally, he's claiming

1 that he never received the documentation from us, that  
2 being the invoice in 2010 and the subsequent last-  
3 chance opportunity letter in 2012. In fact, he was  
4 sort of hanging his hat on the fact that, on his  
5 invoice, with the address on the invoice, apparently  
6 when it was printed out, it missed a digit and the  
7 digit was written in, and he's trying to say, who's to  
8 know whether or not that digit was written in after the  
9 fact and not when it was sent to him.

10 But, you know, the division sent an  
11 administrative denial saying that even though it really  
12 wasn't the correct denial, because we're saying that  
13 you have to apply for it within your first year of  
14 employment, which he actually did, it's really the  
15 denial is the fact that the matter was closed in 2012  
16 when he failed to respond to the last-chance  
17 opportunity letter.

18 MR. CAREY: Colin, this is Mike Carey. I do  
19 see that minimally the last-chance letter does indeed  
20 have the digit printed on the letter.

21 MR. NEWMAN: Right.

22 MR. CAREY: So I will say that I would make a  
23 motion that we recommend that the commission deny Mr.  
24 Stegeman's request to obtain retirement credit for  
25 prior military service based on his failure to respond

1 to the last-chance notice issued in June of 2012.

2 MR. CHISEM: Carl Chisem, I'll second.

3 CHAIRMAN ADOMEIT: Is there any further  
4 discussion? Okay, hearing none, all in favor of the  
5 motion, raise your hand or say aye. It's unanimous;  
6 the ayes have it.

7 Okay, we have James - is it Houlberg?

8 MR. NEWMAN: Yes.

9 CHAIRMAN ADOMEIT: That's the one we amended  
10 the agenda to add.

11 MR. NEWMAN: Right. This is Colin. Yes, we  
12 amended the agenda to add Mr. Houlberg. So Mr.  
13 Houlberg is an individual that was initially hired in  
14 August of 2021 as a sub instructor with the Department  
15 of Education. He completed his CO-931 4S designation  
16 of retirement plan election, which was to be completed  
17 by all sub instructors who were first hired on or after  
18 July 31<sup>st</sup>, 2017. So he was a member of the retirement  
19 plan SERS Tier 4S retirement plan.

20 Approximately a year later, the Department of  
21 Education offered him, and he was hired as, a fulltime  
22 teacher. At that time, they provided him with a CO-991  
23 retirement credit purchase request for any prior  
24 miscellaneous service that he may have had, in which  
25 case, Mr. Houlberg had prior military service, and I

1 had listed the dates that he had served. Sorry about  
2 that big bang. I think like half a tree just fell on  
3 the ground.

4 So an application came in in December of last  
5 year. The division administratively denied his request  
6 based on the fact that the application had not been  
7 submitted within his first year of employment. Mr.  
8 Houlberg appealed the administrative denial. He  
9 claimed during his onboarding, that he was told by the  
10 - basically told by the individual or individuals that  
11 he was ineligible to purchase his prior military  
12 service based on the fact that he was a sub instructor  
13 and not, I guess in their minds, a regular fulltime  
14 employee.

15 The division, we reached out to the agency to  
16 get their take on what Mr. Houlberg was stating, and  
17 the agency came back with that email and said, yes,  
18 he's correct in the fact that he was told that he was  
19 ineligible back in August of '21 when he first came on  
20 board as a sub instructor, and it was due to the fact  
21 that he was a sub instructor.

22 So because the division had already  
23 administratively denied his request and he had made a  
24 claim, that's - we placed it on the agenda of this  
25 meeting.

1 MR. CAREY: Colin, this is Mike. I've got  
2 kind of a procedural question. I mean, I don't know  
3 how much - if I'm hired as a substitute teacher, I  
4 don't know how much they are - they can anticipate  
5 working.

6 MR. NEWMAN: Correct. Yeah, it's like a per  
7 diem.

8 MR. CAREY: It's like a per diem. And we  
9 don't have any provisions that sort of - I guess what  
10 I'm saying is if I'm hired as a per diem, and even if I  
11 were told I could purchase the time, I just got hired  
12 as a per diem. I don't know that I want to lay out the  
13 kind of cash to purchase military service when I've  
14 just been hired as a per diem.

15 MR. NEWMAN: It could be viewed like that,  
16 you know, by the agency, but-

17 MR. CAREY: I mean, I don't know. I  
18 understand that, you know, he was hired, and because he  
19 was hired, he should have been notified at that time  
20 that he was eligible to purchase. But, you know, I'm  
21 just kind of wondering, in a practical sense, you know,  
22 would we - do we really anticipate people who are  
23 eligible to purchase time to do so, unless they're  
24 hired on a more permanent basis?

25 MR. NEWMAN: This is Colin. For the sub

1 instructors, like a lot of them like continue in that  
2 position because they usually end up getting hired as a  
3 fulltime teacher, hence the reason why that Tier 4S  
4 plan was created for them specifically, you know, for  
5 that reason, because like a lot of them do go on and  
6 become like employees, like fulltime employees or  
7 fulltime teachers.

8 MR. KRAYESKI: This is Dave Krayeski. In an  
9 instance where hiring, you know, durational employees  
10 or per diems or those kinds of things, I'm not sure  
11 they go through the full, robust onboarding process  
12 that maybe a permanent fulltime employee necessarily  
13 does. You know, I have a hard time if somebody was  
14 given erroneous information at the moment of hire  
15 (inaudible) and would be willing to support him being  
16 given the opportunity to apply for purchasing this  
17 credit.

18 MR. CAREY: Given that he immediately, upon  
19 hire into a permanent job, he did make that request, I  
20 would be inclined to agree.

21 CHAIRMAN ADOMEIT: Is there any further  
22 discussion before we make a motion? Okay.

23 MS. MESKERS: This is Patty Meskers. Just to  
24 clarify for going forward with other cases, I agree,  
25 erroneous information should be looked at differently,

1 but for eligible SERS positions, they should be getting  
2 the same onboarding because it is an eligible position,  
3 and Tier 4S was created for substitute teachers. Many  
4 of them do then get certified and go to teacher's  
5 retirement, so they may choose not to do so. But I  
6 think the one-year deadline is specific.

7 So I agree, erroneous information. I just  
8 kind of wanted to put that out there for clarification,  
9 if similar, but not the same cases come forward.

10 MR. KRAYESKI: This is Dave Krayeski. I  
11 agree with you, Patty. I mean, you know, we - I would  
12 agree with that. And agencies - some agencies do a  
13 little better job than others in that regard. But  
14 yeah.

15 Mr. Chairman, do you need a motion?

16 MR. CAREY: So-

17 CHAIRMAN ADOMEIT: Mr. Carey was about to say  
18 something.

19 MR. CAREY: Dave, would you make the motion?  
20 Go for it.

21 MR. KRAYESKI: This is David Krayeski. I  
22 make a motion that we approve the request of - the  
23 appeal request of Mr. Houlberg and allow the  
24 opportunity to make a purchase.

25 MR. CHISEM: Carl Chisem. I'll second it.

1                   CHAIRMAN ADOMEIT:   Okay.   Any further  
2   discussion?

3                   MR. CAREY:   I would just add, Mr. Chairman,  
4   I'd like to suggest a friendly amendment that we  
5   include that we are taking this action in light of the  
6   agency's acknowledgement of error in communication to  
7   Mr. Houlberg.

8                   CHAIRMAN ADOMEIT:   Okay.   So how does the  
9   motion then read?   Because Cindy's got to write it  
10   down, or somebody does.

11                  MR. CAREY:   I don't know if David and Carl  
12   accept my amendment.

13                  MR. CHISEM:   Uh, yes.

14                  MR. KRAYESKI:   This is David Krayeski.   We  
15   accept your amendment.   And I'll restate the motion.  
16   So this is David Krayeski.   I make a motion to approve  
17   the request for appeal by Mr. Houlberg to purchase  
18   retirement credit for military service based on the  
19   fact that he was given erroneous information by his  
20   employing agency at the time.

21                  MR. CHISEM:   This is Carl Chisem.   I'll  
22   accept and second it.

23                  CHAIRMAN ADOMEIT:   Okay.   Any further  
24   discussion?   Hearing none, all in favor, say aye or  
25   raise your hand.   One, two, three.   The ayes have it.

1                   We are at the end of our agenda, I believe.

2       Yes.

3                   MR. CAREY:   Mr. Chairman, this is Mike Carey.

4       I move to adjourn.

5                   MR. CHISEM:   Carl Chisem.   I'll second.

6                   CHAIRMAN ADOMEIT:  All in favor, say aye or  
7       raise your hand.   The ayes have it.

8                   MR. CAREY:   And no amendments to that motion.

9                   CHAIRMAN ADOMEIT:  Hey, thank you all very  
10       much.

11                   MR. CAREY:   Take care, everybody.

12                   (Adjourned at 2:24 p.m.)

13

14

15

16

17

18

19

20

21

22

23

24

25

1  
2  
3  
4  
5  
6  
7  
8  
9  
10  
11  
12  
13  
14  
15  
16  
17  
18  
19  
20  
21  
22  
23  
24  
25

I, Karin A. Empson, do hereby  
certify that the preceding pages are an accurate  
transcription of the Connecticut State Employees  
Retirement Commission, Subcommittee of Purchase of  
Service & Related Matters meeting held electronically  
via Zoom, conducted at 1:04 p.m. on May 11, 2023.

Karin A. Empson

Karin A. Empson

06/05/2023

Date