



Sacramento Regional Transit District Agenda

SPECIAL MEETING OF THE ATU RETIREMENT BOARD FOR THE EMPLOYEES AND RETIREES OF THE SACRAMENTO REGIONAL TRANSIT DISTRICT

WEDNESDAY, JULY 26, 2023 AT 1:00 P.M.

REGIONAL TRANSIT

1102 Q STREET

SACRAMENTO, CALIFORNIA

(13th St. Light Rail Station)

Website Address: www.sacrt.com

ROLL CALL

Directors: Li, Kennedy, McGee Lee, Scott
Alternates: Valenton, Smith

NEW BUSINESS

1. Motion: Approval of Disability Retirement Application for Tony York (ATU)
(Gobel)

ADJOURN

NOTICE TO THE PUBLIC

It is the policy of the Boards of Directors of the Sacramento Regional Transit District Retirement Plans to encourage participation in the meetings of the Boards of Directors. At each open meeting, members of the public shall be provided with an opportunity to directly address the Board on items of interest to the public that are within the subject matter jurisdiction of the Boards.

This agenda may be amended up to 24 hours prior to the meeting being held. An agenda, in final form, is located by the front door of the Sacramento Regional Transit District's administration building at 1400 29th Street and by the front door of the office building at 1102 Q Street. An agenda is also posted to the website www.sacrt.com. Any person(s) requiring accessible formats of the agenda or assisted listening devices/sign language interpreters should contact the Pension and Retirement Services Administrator at 916-556-0296 (TDD 916-483-4327) at least 72 business hours in advance of the Board Meeting.

Copies of staff reports or other written documentation relating to each item of business referred to on the agenda are available online at www.sacrt.com and are on file with the Retirement Services Analyst and the Clerk to the Board of Directors of the Sacramento Regional Transit District, and available for public inspection at 1400 29th Street, Sacramento, CA. Any person who has questions concerning an agenda item may call the Retirement Services Analyst (916-216-9927) of the Sacramento Regional Transit District to make inquiry.



RETIREMENT BOARD STAFF REPORT

DATE: July 26, 2023 Agenda Item: 1
TO: Sacramento Regional Transit Retirement Board – ATU
FROM: John Gobel – Senior Manager, Pension and Retirement Services
SUBJ: Approval of Disability Retirement Application of Tony York - ATU

RECOMMENDATION

Adopt the attached Resolution approving the Disability Retirement Application of Tony York (hereinafter “Applicant”).

RESULT OF RECOMMENDED ACTION

Subject to final determination by the Retirement Board, Applicant will be awarded a Disability Retirement and receive a lifetime Disability Retirement Allowance from the Retirement Plan for Sacramento Regional Transit Employees who are Members of ATU Local 256 (hereinafter the “ATU Plan”).

FISCAL IMPACT

The ATU Plan provides Disability Retirement and Service Retirement benefits to members who meet the applicable criteria. Although Applicant’s age and years of service in the ATU Plan already allow him to apply for and receive a Service Retirement benefit, he has declined to do so, and instead is pursuing a Disability Retirement benefit at this time.

DISCUSSION

Background: Applicant was hired by the Sacramento Regional Transit District (SacRT) in April 2012 and has held his current job classification, Light Rail Operator, since April 2014. Applicant remains employed by SacRT, but has not presented at the workplace since October 2022. While pursuing Disability Retirement benefits, Applicant submitted a Disability Retirement Application on October 27, 2022, a medical report from his primary care physician on December 28, 2022, and a form clarifying his disabling condition on April 4, 2023.

In accordance with the Policy for Processing Disability Retirements for all Retirement Boards, Staff contacted the Retirement Plans' disability examination firm, National Disability Evaluations, in May 2023 and scheduled a virtual independent medical examination (IME) for June 2023. Thereafter, the examining physician reviewed the evidentiary catalog compiled by Staff (which included Applicant's job description, records related to leaves of absence during his employment with SacRT, and over 700 pages of medical records), interviewed Applicant, and issued a written report with responses to standard questions from Staff.

Eligibility: Applicant is a member of the ATU Plan pursuant to Article 3 of the Plan document.

Vesting: Applicant has completed at least 10 Years of Service and achieved full vesting pursuant to Article 5 of the Plan document.

Status: Applicant is an Eligible Employee under Article 3.1 of the Plan document.

Disability: Martin Schlusberg, M.D., J.D., examined Applicant on June 26, 2023 and Staff received the IME report on June 30, 2023. Therein, Dr. Schlusberg concluded that the chronic condition identified in the Disability Retirement Application is permanent and renders Applicant incapable of performing the duties of his position as a Light Rail Operator. Consistent with these findings, Dr. Schlusberg recommends the granting of a Disability Retirement.

Allowance: Upon approval by the Retirement Board, Staff will direct the ATU Plan's actuary to prepare a benefit calculation and quantify the Disability Retirement Allowance payable to Applicant.

RESOLUTION NO. 2023-07-354

SACRAMENTO REGIONAL TRANSIT RETIREMENT BOARD RESOLUTION

Adopted by the Board of Directors for the Retirement Plan for the Sacramento Regional Transit District Employees who are Members of ATU Local Union 256 on this date:

July 26, 2023

Approve Disability Retirement Application of Tony York

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS FOR THE RETIREMENT PLAN FOR THE SACRAMENTO REGIONAL TRANSIT DISTRICT EMPLOYEES WHO ARE MEMBERS OF ATU LOCAL UNION 256 AS FOLLOWS:

THAT, the Board of Directors for the Retirement Plan for the Sacramento Regional Transit District Employees who are Members of ATU Union Local 256 hereby approves the disability retirement application of Tony York.

Crystal McGee Lee, Chair

ATTEST:

Henry Li, Secretary

By:

John Gobel, Assistant Secretary