



PSERB Resolution 2026-02

Re: Benefits and Appeals Committee 2026 Work Plan
January 9, 2026

RESOLVED, that the Public School Employees' Retirement Board accepts the recommendation of the Benefits and Appeals Committee and approves the attached Benefits and Appeals Committee Work Plan for 2026 to guide the Committee Chair in the development of agendas and authorizes the Committee Chair to revise the Work Plan, as needed.



Public School Employees' Retirement Board B&A Work Plan Items 2026



 PUBLIC SCHOOL EMPLOYEES' RETIREMENT SYSTEM

Public School Employees' Retirement Board
 B&A Work Plan Items
 2026

| | | | | Start date | End date | Date Flexibility (can be earlier, but not later) | Frequency | Committee Action Item | Board Action Item | January 9 | February | March 19-20 | April | May | June 17-18 | July | August 12, 13, 14 | September | October 22-23 | November | December 17-18 | | |
|--------------------|----------|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|---------------|--------------------------------------------------------|---------------|--------------------------|----------------------|-----------|----------|-------------|-------|-----|------------|------|-------------------|-----------|---------------|----------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| Status for 2026 | Training | Board or Committee Training | Benefits and Appeals Committee | | | | | | | x | x | | | x | x | x | x | x | x | x | x | Special Comments | |
| | | | The Board Chair is to appoint Committee members. | 1/1/26 | TBD 1/2028 | | Biennially | | | x | | | | | | | | | | | | | |
| | | | The Committee Chair is to set the dates and times of the committee meetings. | 1/9/26 | TBD 1/2027 | No | Annually | No | No | x | | | | | | | | | | | | | |
| | | | Elect Chair | 1/9/26 | TBD 1/2028 | No | Biennially | Yes | No | x | | | | | | | | | | | | | |
| | | | Elect Vice-Chair | 1/9/26 | TBD 1/2028 | No | Biennially | Yes | No | x | | | | | | | | | | | | | |
| | | | Conduct a self-evaluation of the Committee's performance as part of the Board's self-evaluation process. | | TBD | Yes | Annually | No | No | | | | | | | | | | | | | Contingent on the development of the Board's self-evaluation process. | |
| | | | Review the Committee Charter at least every three years. | last reviewed 3/2025 | TBD 3/2028 | No | Every 3 years | Yes | Yes | | | | | | | | | | | | | Any proposed changes are to be done as a Bylaws change. Confer with the Governance and Administration Committee. If no proposed changes, then the Committee's report to the Board will document that the charter was reviewed and no changes were referred. | |
| | | | A. Activities Conducted on behalf of the Board | | | | | | | | | | | | | | | | | | | | |
| | | | 1. Conduct quasi-judicial deliberations in formal appeals and make recommendations for Board action, including the issuance of proposed opinions and orders. | | | Yes | As Needed | Yes | Yes | | | | | | | | | | | | | Adjudications will be scheduled based on Office of Chief Counsel review and drafting of a memo and board order. | |
| | | | Account of Gregory W. Snook, Docket No. 2024-06 | | | | | | | | | | | | x | | | | | | | | |
| | | | Account of Gayle Apfel, Docket No. 2022-12 | | | | | | | | | | | x | | | | | | | | | |
| | | | Account of Margaret Tavakalian, Docket No. 2023-08 | | | | | | | | | | | | | | | | | | | | |
| | | | Account of Michelle Baker, Docket No. 2023-09 | | | | | | | | | | | | | | | | | | | | |
| | | | Account of Nabeelah A. Bey, Docket No. 2024-02 | | | | | | | | | | | | | | | | | | | | |
| | | | Accounts of Linda Gail Long, et al., Docket Nos. 2024-10 through 2024-18, and 2024-24 | | | | | | | | | | | | | | | | | | | | |
| | | | Account of Michelle Plinta, Docket No. 2023-05 | | | | | | | | | | | | | | | | | | | | |
| | | | Account of Kelly A. Carpenter, Docket No. 2024-22 | | | | | | | | | | | | | | | | | | | | |
| | | | Account of Nana Amoh, Docket No. 2025-03 | | | | | | | | | | | | | | | | | | | | |
| | | | 2. Conduct the search for the System consultant that directly impacts member and employer services and the administration of the System, with the assistance of staff, and make recommendations to the Board. | | | Yes | Every 5 years | Yes | Yes | | | | | | | | | | | | | There is no system consultant currently on contract. | |
| | | | 3. Evaluate the performance of the System consultant and key System service providers that significantly impact member and employer services and the administration of the System as shall be necessary or appropriate for the administration and operation of the System. | | | Yes | Annually | No | No | | | | | | | | | | | | | | |
| | | | Identify, based on work contracted, which service providers need to be evaluated | | | Yes | | No | No | x | | | | | | | | | | | | | |
| | | | Develop the standards of evaluating performance, i.e. SLAs, metrics, benchmarking, etc. | | | Yes | | No | No | | | | | x | | | | | | | | | |
| | | | Evaluate identified service providers | | | Yes | | No | No | | | | | | | | x | | | | | | |

