

MINUTES  
OF THE MEETING OF  
THE EXECUTIVE COMMITTEE  
STATE EMPLOYEES' RETIREMENT SYSTEM OF ILLINOIS

November 13, 2025

A meeting of the Executive Committee of the State Employees' Retirement System of Illinois was held on Thursday, November 13, 2025, at 8:45 a.m. in the System's Springfield office at 2101 S. Veterans Parkway.

Committee Members Present:

Marvin Becker, Chairperson  
Arnold Black, Vice-Chairperson  
Timothy Blair, Executive Secretary

Others Present:

Jeff Houch, Associate Executive Secretary  
Jessica Blood, Recording Secretary  
Aaron Evans, Attorney, Sorling Northrup  
Stephanie DeLong, Claimant  
Micah Jones, Claimant  
Kathleen Whalen, Claimant  
Laura Stone, Claimant's Associate

Minutes of the Previous Meeting

Chairperson Becker presented the minutes of the Executive Committee's meeting on October 15, 2025, for approval. Copies of the minutes were previously emailed to Committee members for review. Chairperson Becker moved to approve the minutes as submitted. The motion was seconded by Vice-Chairperson Black and passed unanimously.

Routine Claims Report

The Routine Claims Report for October 2025 was presented. Following a brief discussion, the Routine Claims Report for October 2025, as prepared by staff, was received by the Committee.

Old Business

Stacie Merano – Appeal Overpayment of Occupational Disability Benefits – Recommendation

Stacie Merano worked for the Illinois State Police. She went on Occupational disability

leave in November 2005 due to disabling conditions.

An IDES report showed that Ms. Merano exceeded the quarterly earnings limitation in the 2nd quarter of 2025. According to this report, she was working for Carlinville and Bunker Hill school districts.

An overpayment was set up for her pay that exceeded the earnings limitation, and Ms. Merano was sent a letter and an Earnings Agreement to sign and return.

Ms. Merano appealed the overpayment by personal hearing. She states she has been able to work as a substitute teacher and doesn't have consistent employment. She doesn't always work every quarter, and she doesn't get any work during the summer months. She would like her earnings to be considered over the year instead of quarterly.

After hearing Ms. Merano present her appeal at their October 2025 meeting, the Committee referred her case to external counsel for a recommendation.

Attorney Evans presented Recommendation No. 2025-10, to deny Ms. Merano's appeal. Chairperson Becker moved to adopt Recommendation No. 2025-10 and Executive Secretary Blair seconded the motion, which passed unanimously.

### New Business

#### Stephanie DeLong – Appeal Suspension of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – 9:00 a.m.

Stephanie DeLong has been on disability since October 2021 for disabling conditions. Ms. DeLong moved to Tennessee in 2022, and she and her husband opened a restaurant, while also owning a restaurant in Pontiac, Illinois. Ms. DeLong's earnings exceeded the System's calendar limitations during the 4th quarter of 2021 and 2nd quarter of 2022 from the Pontiac, Illinois restaurant. In August 2022, Ms. DeLong signed a disability earnings agreement, agreeing to reimburse the overpayment and understanding that going over the System's quarterly limitations a second time shall be considered gainful employment which would necessitate termination of benefits. Ms. DeLong has also applied for and been denied SSA disability.

Ms. DeLong's certification of disability benefits does note that she is self-employed while on SERS disability. In September 2025, it was determined through Ms. DeLong's tax returns that she exceeded the System's quarterly limitations a second time. Her 2024 return lists gross receipts from the Tennessee restaurant of \$1,564,614. Ms. DeLong's business showed a net profit of just over \$19,000 this year. The Pontiac, Illinois restaurant closed in October 2024.

Ms. DeLong is requesting a personal hearing to appeal against the gainful employment determination and states that she has no income from any other employer, nor is she a W-2 employee. She states the income she receives is from her deceased husband's

pension and money she had to take out of deferred compensation.

After hearing Ms. DeLong present her case, the Committee referred to external counsel for a recommendation.

Micah Jones – Appeal for Conversion to Occupational Disability Benefit and Continuation of Benefits – Personal Hearing via Teleconference – 9:45 a.m.

Micah Jones works for the Illinois Department of Corrections as a Correctional Officer. He filed a Workers' Compensation (WC) claim for exposure to toxic chemicals last working on August 18, 2024. He claims to have multiple disabling conditions.

Mr. Jones' WC claim was denied, so he could only apply for a temporary disability benefit from SERS. Mr. Jones has not yet settled his WC claim. It is noted that he is supposed to have a hearing sometime in November. Mr. Jones' temporary benefit is slated to be terminated December 31, 2025 due to his half-time ceasing.

Mr. Jones is appealing against the termination of benefits in December, stating that his disabling conditions are work related and should not have ever been considered temporary or nonoccupational. His termination letter from SERS indicated that his "nonoccupational" benefit would be ceasing, but he's in fact on a temporary benefit.

Mr. Jones is requesting a personal hearing via teleconference. He is asking for reconsideration and reclassification of his disability status as Occupational Disability in accordance with Section 14-123 of the Illinois Pension Code, immediate continuation of benefits without interruption, and correction of any errors or delays that have caused financial hardship due to administrative inaction.

Following Mr. Jones' presentation of his appeal, the Committee referred to external counsel for a recommendation.

Kathleen Whalen – Appeal Denial of Nonoccupational Disability Benefits – Personal Hearing via Teleconference – 10:30 a.m.

Kathleen Whalen worked for the Department of Human Services as an Office Associate II. She last worked on January 29, 2021, when she went on family responsibility leave. On February 1, 2022, she applied for a nonoccupational leave of absence.

Ms. Whalen alleged disability due to primarily mental impairments. She submitted the Medical Report Form, but this form was insufficient to determine disability. SERS mailed a letter requesting that she submit additional medical evidence to support her claim. She never supplied records, and her claim was purged.

Ms. Whalen never returned to work. SERS recently received another application from Ms. Whalen for nonoccupational disability benefits alleging an additional disabling condition since July 2024.

It was explained to Ms. Whalen that the plan design requires that a member be found disabled at the time of their leave of absence, see Title 80, Section 1540.80 (I) of the Illinois Administrative Code. She was told that to receive a benefit, she would have to supply medical evidence back to her original filing date to present and that these records would have to be sufficient to find her mentally or physically incapacitated from performing her job duties.

Ms. Whalen supplied medical records from 2021 through May 2025. Her file was sent to SERS' medical consultants for a disability determination. MMRO found that Ms. Whalen is disabled and determined that the medical evidence supported an onset of July 2024. Therefore, her claim remains denied. Ms. Whalen is appealing the denial of her disability claim.

After discussing the information provided by Ms. Whalen and her associate Laura Stone in her appeal, Chairperson Becker moved to approve nonoccupational disability benefits for Ms. Whalen for a closed period of 10 months, which corresponds to when her "half time" ceased. Vice-Chairperson Black seconded the motion, which passed unanimously.

#### Ramez Aladdin – Appeal Denial of Nonoccupational Disability Benefits

Ramez Aladdin works for the Illinois Department of Transportation as an Associate Consultant Studies Engineer. He applied for a SERS nonoccupational disability benefit due to multiple disabling conditions with an alleged onset date of April 10, 2025.

Mr. Aladdin's case was sent to SERS' medical consultants who determined that Mr. Aladdin was not mentally or physically incapacitated from performing his job duties. Mr. Aladdin submitted additional records with his request for an appeal. His file and additional medical were sent back to MMRO for an addendum. After reviewing additional medical evidence, the case was returned with the same result.

Mr. Aladdin is requesting a written appeal of his denial of nonoccupational disability benefits.

After reviewing the facts presented and some discussion, Chairperson Becker moved to deny Mr. Aladdin's appeal. The motion was seconded by Executive Secretary Blair and passed unanimously.

#### Mary Augspurger – Appeal Overpayment of Retirement Annuity Benefit

Mary Augspurger retired effective 2018 and had been collecting a retirement annuity. Ms. Augspurger returned to work on March 17, 2025 but failed to notify SERS. Ms. Augspurger was then on active payroll while also receiving a retirement annuity. Staff became aware of her return-to-work status in April 2025. This caused an overpayment from March 1, 2025 through April 30, 2025 of \$7,122.58. SERS cannot pay a member a retirement annuity while they are receiving an active payroll as the benefit terminates upon return to work. See 40 ILCS 5/14-111.

Ms. Augspurger is requesting a written appeal stating that she was unable to work most of the time once she returned due to medical issues. Ms. Augspurger then retired again as of July 1, 2025. Ms. Augspurger says it was our mistake, not hers, and since she stopped receiving a retirement annuity since May then “we should be even.”

Ms. Augspurger retired with reciprocal service from SURS. They failed to stop her benefit due to not being made aware even though SERS staff emailed them in April once we were notified. SURS has acknowledged Ms. Augspurger’s return to work and will suspend her benefit effective the date of her return.

Following a review of the details of Ms. Augspurger’s case, Executive Secretary Blair moved to deny her appeal. The motion was seconded by Chairperson Becker and passed unanimously.

#### Kimberly Bell – Appeal Denial of Nonoccupational Disability Benefits

Kimberly Bell works for the Department of Human Services as a Human Services Caseworker. In March 2025, she was having medical issues from a prior medical procedure. She underwent an additional medical procedure that month and was able to return to work without restrictions in May 2025. SERS paid her a nonoccupational disability benefit for this period.

In August 2025, Ms. Bell filed another claim stating she needed to have a revision of her surgical scar. This claim was denied by the Disability Section as being a cosmetic procedure which is not covered by disability.

The member is appealing against the denial of her second claim. She states the revision was necessary. She stated after surgery she was unable to perform her job duties.

Medical records show she was released from her original surgery to full-duty, and she was able to work for several months without issues. It is also noted that she wished to delay the surgery until after she returned from a vacation in July.

While SERS does not argue that she underwent a significant surgery which required weeks of recovery, the Disability Section contends this was an elective surgery and not medically necessary. Ms. Bell is appealing the denial of her claim.

After reviewing the facts of the case, Executive Secretary Blair moved to deny Ms. Bell’s appeal. The motion was seconded by Vice-Chairperson Black and passed unanimously.

#### William Helm – Felony Forfeiture of Pension Benefits

William Helm was a member of SERS while working as a Technical Manager V for the Illinois Department of Transportation (IDOT) from June 1, 2004 to February 3, 2014. He retired from SERS in 2020 and had been receiving a benefit until it was suspended

for this conviction.

According to the records of the United States District Court for the Northern District of Illinois, Mr. Helm was charged with and subsequently pleaded guilty to one count of bribery (18 U.S.C. § 666(a)(2) (2012) and one count of filing a false tax return (26 U.S.C. §7206(1) (2012)) that occurred between July 2018 and November 2018. The court sentenced Mr. Helm to 18 months of imprisonment and one year of supervised release on each count, all to run concurrently, and ordered Helm to pay \$9,318.00 in restitution.

The committee discussed the details of his conviction, his State service, and the various “tests” used to determine if a felony conviction is connected to a member’s service. Following that discussion, the Committee deferred a decision pending additional research.

#### Michael Otto – Request for Reappeal to Calculate SERS Proportional Annuity Payment Utilizing Uncapped JRS Earnings Credits

On September 11, 2025, the Executive Committee unanimously denied Judge Otto's appeal for his future SERS pension calculation to utilize his earnings which exceed the earnings limitation applicable to Tier 2. The basis of the denial is that his pensionable salary under the Judges' Retirement System (JRS) is limited by 40 ILCS 5/18-1 25(b-5), and 40 ILCS 5/20-106(b) provides that the earnings credits used to calculate his SERS proportional retirement annuity shall reflect "any limitations on earnings for annuity purposes that are imposed by the Article governing the system."

Additionally, SERS lacks the authority to declare Public Act 96-0889 unconstitutional or even question its validity. Cinkus v. Vill. Of Stickney Mun. Officers Electoral Bd., 228 Ill. 2d 200,214, 886 N.E. 2d 1011, 1020 (2008), as modified (Apr. 23, 2008). The legislature's decision to confer benefits to judges under Article 18 that differ from benefits afforded under other Articles of the Pension Code is in the nature of economic regulation. SERS has no authority to determine whether such distinctions have a rational basis for purposes of the equal protection clause, nor does SERS have authority to determine whether Public Act 96-0889 constitutes special legislation. The assertion that Public Act 96-0889 violates the three-readings requirement is a facial challenge to the constitutional validity of the act.

Judge Otto provided supplemental information regarding this decision and is requesting a reappeal of his case.

After discussing the information provided, Executive Secretary Blair moved to allow Judge Otto a reappeal of his case. The motion was seconded by Chairperson Becker and passed unanimously.

#### Channe Ford – Staff Guidance – Exceeding of Gainful Activity Limitation Multiple Times

Channe Ford began receiving survivor's benefits from the State Employees' Retirement System as a disabled survivor on August 1, 2007. Given her status, she is subject to the gainful-activity limitation, which occurs when the survivor receives employment wages in a calendar quarter that exceeds the "substantial gainful activity" amount that is determined annually by the Commissioner of the Social Security Administration.

Since 2023, her survivor's annuity has been suspended twice because she exceeded the gainful activity limitation. The most recent suspension took effect on July 1, 2025, and the Executive Committee has reinstated her benefit both times. The Executive Committee approved the reinstatement of her annuity at the August 7, 2025 meeting. As staff was completing the process to reinstate her benefit, it was determined that she also exceeded the gainful-activity limitation during the 3<sup>rd</sup> quarter of 2025.

Given these dynamics, staff is seeking guidance on how to proceed.

After discussing the facts presented, Chairperson Becker moved to retroactively reinstate Ms. Ford's survivor benefits and recoup her overpayment from future benefit payments. The motion was seconded by Vice-Chairperson Black and passed unanimously.

There being no further business to be brought before the Committee, the meeting was adjourned at 12:28 p.m.

The next meeting of the Executive Committee is scheduled for December 11, 2025, in the System's Springfield office.

---

Marvin Becker, Chairperson

---

Arnold Black, Vice-Chairperson

---

Timothy Blair, Executive Secretary