**NEWTON RETIREMENT BOARD MEETING**
**Tuesday, October 28, 2025 9:00 a.m.**
**Location: Newton City Hall, Room 211**
**Agenda**

## New Agenda Items:

1. Receipt of an accidental disability retirement application from Firefighter Joseph Blanchard, pursuant to M.G.L. Chapter 32, Section 7. Member's Application, Treating Physician Statement and Employer's Statement have all been received. Mr. Blanchard is represented by Attorney Paul Hynes. The Board may enter Executive Session pursuant to reason 1 under G.L. c.30A s.21 ("To discuss the …physical condition or mental health…of an individual…").
2. Receipt of an accidental disability retirement application from Firefighter Paul Bobos, pursuant to M.G.L. Chapter 32, Section 7. Member's Application, Treating Physician Statement and Employer's Statement have all been received. Mr. Bobos is represented by Attorney Paul Hynes. The Board may enter Executive Session pursuant to reason 1 under G.L. c.30A s.21 ("To discuss the …physical condition or mental health…of an individual…").
3. Receipt of three single physician medical panel certificates in connection with Police Officer Mathew Tocci's application for accidental disability retirement pursuant to M.G.L. Chapter 32, Section 7. Mr. Tocci is represented by Atty. Leigh Panettiere. The Board may enter Executive Session pursuant to reason 1 under G.L. c.30A s.21 ("To discuss the …physical condition or mental health…of an individual…").
4. Receipt of three single physician medical panel certificates in connection with Police Officer Francis Scaltreto's application for accidental disability retirement pursuant to M.G.L. Chapter 32, Section 7. Mr. Scaltreto is represented by Atty. Kathleen Kiely-Becchetti. The Board may enter Executive Session pursuant to reason 1 under G.L. c.30A s.21 ("To discuss the …physical condition or mental health…of an individual…").
5. Review of proposals received in response to RFP for Actuarial Services.
6. PRIM Private Equity Vintage Year 2026- Commitment Deadline Notice
7. Retirement deduction adjustment -Payroll discussion
8. Board to review regular session minutes of meeting held September 23, 2025
9. Review resumes for Newton Retirement Board Director position and discuss posting
10. Discussion concerning the engagement of temporary personnel to support retirement office staff
11. Payment of election postage -Vote by mail return envelopes
12. Anonymity of ballots-Board election

## Administrative Agenda Items:

13. Monthly Financial Reporting for month ending August 2025
14. Board to approve new members as indicated on list provided in Board Member's monthly packet
15. Board to approve the following expense warrants:

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| Warrant # 24-25 | 10-28-25 | 10/31/2025 Contributory pension payroll | $ | 4,275,884.83 |
| Warrant # 25-25 | 10-29-25 | Administrative expense/member account disbursements | $ | 319,419.00 |
| Warrant # C09-25 | 10-29-25 | Federal Tax | $ | 1,633.31 |

## Pending Agenda Items:

1. Current status of pending disability retirement applications – **informational only**:

| Applicant | Dept. | Current Status |
|---|---|---|
| Brian McNamara | Fire Dept. | ADR approves by PERAC on 9/29/2025 |
| Steven Rogers | School Dept. | Medical Panel appts. scheduled for 9/12/25, 9/16/25 & 9/23/25 |
| Michael Gentile | Fire Dept. | NRB accepted application on 7/29/25; Staff is in process of collecting medical records |

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| Richard Benes | Police Dept. | NRB accepted application on 7/29/25; Staff is in process of collecting medical records |
| Kaiss Horani | School Dept | Medical Panel appts. scheduled for 9/30/25, 10/9/25 & 10/29/25 |
| Michael McSweeney | Police Dept | NRB accepted application on 8/26/25;Staff is in process of collecting medical records |
| Glen Chisholm | Police Dept | NRB accepted 2 applications on 9/23/25; Staff in process of collecting medical records |

2. Scott Perella –5 year repayment plan; oral agreement with member to mail payment on the 25th of each month- repayment to be completed by May 2029

3. Michael Abbruzzese, James McCarthy, and Thomas McCarthy-repayment agreement regarding 2023 excess earnings; The Board may enter Executive Session for reason 3 under G.L. c.30A s.21 ("To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body and the chair so declares")

4. 91A Hearings scheduled for 10/28/2025 – All in compliance

5. PRIM Portfolio review scheduled for 11/20/2025.

6. Determination in regard to amount to be transferred to PRIT effective 12/1/25 was tabled until the 11/20/25 board meeting

7. Dori Zaleznik's Needham Bill waiver request and refund of elected official service credit purchase – tabled pending resolution of all litigation

8. Staff update on Employee Handbook

9. 2024 post-retirement excess earnings discussion with Human Resources Department (HR) - meeting with HR scheduled for 9/2/25 was postponed per HR request

10. Staff update storage space, scanning, Massachusetts Municipal Retention Schedule, PTG Customer Data and Security and disaster recovery of scanned documents

11. Current status of pending appeal cases – The Board may enter Executive Session for reason 3 under G.L. c.30A s.21 ("To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body and the chair so declares")

12.

| Petitioner | Docket# | Most Recent Status |
|---|---|---|
| Edward Murphy | CR-17-724 | DALA hearing held 9/12/21;5/17/22 recvd DALA decision -NRB's decision which was based on PERAC's directive/ approach re Shift Substitution was reversed.5/31/22 PERAC appealed DALA's decision;9/13/22 CRAB granted a 90 day extension with a filing date on or before 12/21/22 to the member's counsel, Atty Hynes; Member filed response on 12/21/22; Member's counsel requested a status update on 7/17/24;7/19/24 CRAB confirmed that a decision is pending. 9/8/25 Board counsel requested status update from CRAB. |
| Lee Gilliam | CR-23-0039 | 1/25/23 recv'd DALA's Notice of Receipt of Appeal-Mr. Gilliam is appealing the NRB's decision in connection with his Ordinary Disability Retirement;5/8/23 recv'd First Pre-Hearing Order; 10/25/23 Opposing Counsel filed parties' joint pre-hearing memo;10/27/23 DALA granted parties' joint motion to join PERAC as additional party;7/17/24 DALA confirmed the case is awaiting the scheduling of a hearing date; 9/17/24 Received DALA's Notice of Hearing scheduled for 12/18/24;9/24/24 At Petitioner's request, hearing has been stayed pending CRAB's decision in E. Murphy |
| Jeremy Wilson | CR-24-0294 | 5/20/24 recv'd DALA's Notice of Receipt of Appeal-Officer Wilson is appealing the NRB's denial of his accidental disability retirement application; 5/29/24 recv'd DALA Scheduling Order, Petitioner's Pre-Hearing Memorandum due 8/23/24, NRB submission due 10/10/24; 8/20/24 Petitioner submitted his pre-hearing memorandum;10/09/24 Board Counsel filed NRB's pre-hearing memorandum and motion for summary decision; Petitioner has until 11/8/24 to file response to motion;11/07/24 Petitioner filed Motion for Summary Decision Response;2/5/25 DALA determined the appeal will be decided on written submissions. Mr. Wilson filed written response on 2/15/25; Board Counsel filed Memorandum on 2/18/25.2/25/25 DALA decision recv'd;3/6/25 Board Counsel filed Notice of Objection. 4/2/25 Board Counsel filed Memorandum of Law to CRAB;5/8/25 Board Counsel filed Supplement to Objection;6/5/25 Mr. Wilson submitted response to NRS' specific objections to CRAB. |
| Dori Zaleznik | CR-24-0602 | 9/30/24 recv'd DALA's Notice of Receipt of Appeal-Ms. Zaleznik is appealing the termination, and request for repayment, of her retirement benefits; 10/2/24 Recv'd DALA's |

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| | | Order that matter is stayed until NRB rules on Petitioner's motion for reconsideration.;2/3/25 Petitioner filed Joint Motions to Join PERAC and to Lift Stay and Expedite Proceedings;2/4/25 DALA granted Motion to Expedite and Motion to Join PERAC. Joint Pre-Hearing Memo due 5/18/25. Joint Pre-Hearing Memo filed 5/21/25;Hearing tentatively scheduled for 10/8/25;8/12/25 Hearing canceled; Matter will be decided on papers. |
| Michael Abbruzzese | CR-25-0010 | 1/13/25 recv'd DALA's Notice of Receipt of Appeal;1/21/25 Board Counsel filed Motion for Summary Decision; Opposition to Motion for Summary Decision extended to 4/1/25; NRS Amended Motion for Summary Decision filed 5/16/25. Petitioner opposition due 6/16/25. ***9/8/25 Board Counsel requested status update from DALA*** |
| James McCarthy | CR-25-0010 | 1/13/25 recv'd DALA's Notice of Receipt of Appeal;1/21/25 Board Counsel filed Motion for Summary Decision; Opposition to Motion for Summary Decision extended to 4/1/25; NRS Amended Motion for Summary Decision filed 5/16/25. Petitioner opposition due 6/16/25;***9/8/25 Board Counsel requested status update from DALA*** |
| Thomas McCarthy | CR-25-0010 | 1/13/25 recv'd DALA's Notice of Receipt of Appeal;1/21/25 Board Counsel filed Motion for Summary Decision; Opposition to Motion for Summary Decision extended to 4/1/25; NRS Amended Motion for Summary Decision filed 5/16/25. Petitioner opposition due 6/16/25. ***9/8/25 Board Counsel requested status update from DALA*** |
| Noelle Costa | CR-25-0239 | 4/8/25 recv'd DALA's Notice of Receipt of Appeal; Per DALA's Scheduling Order, appeal will be decided on written submissions. Petitioner's submission is due 6/11/25;DALA granted Petitioner extension request to explore settlement. Petitioner memo filed 8/11/25;NRS memo filed 9/23/25. |

**Director's Report** :

- PERAC Board Administrative Training- November 5, 2025

**Correspondence:**

- PERAC Memo #26/25
- PERAC Memo #28/25

**Next scheduled retirement board meeting: Thursday, November 20, 2025 @ 9:00 a.m.**

*NOTE: The Board reserves the right to consider items on the agenda out of order. The listing of matters is those reasonably anticipated by the Chair which may be discussed at the meeting at least forty-eight (48) hours prior to the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law. Items identified for discussion in Executive Session may be conducted in open session, in addition to or in lieu of discussion in Executive Session. A motion to convene an Executive Session may be entertained during the meeting. Meetings are open to the public and will be held in the designated meeting room in Newton City Hall.*
*The location of this meeting is wheelchair accessible and reasonable accommodations will be provided to persons with disabilities who require assistance. If you need a reasonable accommodation, please contact the City of Newton's ADA/Sec. 504 Coordinator, Jini Fairley, at least 2 business days in advance of the meeting: jfairley@newtonma.gov or 617-796-1253. The city's TTY/TDD direct line: 617-796-1089. For the Telecommunications Relay Service (TRS), dial 711.*