

**MINUTES OF PUBLIC MEETING  
FOR THE CORRECTIONS OFFICER RETIREMENT PLAN LOCAL BOARD  
FOR THE JUDICIARY**

A Public Meeting of the Corrections Officer Retirement Plan Local Board for the Judiciary was convened Tuesday, September 3, 2024, at 10:00 a.m., via Zoom, Arizona State Courts Building, 1501 West Washington Street, Phoenix, Arizona.

**Board Members Present by Conference/Video Call:** Kevin Kluge (Chair); Jason Hathcock; Scott Mabery; Jennifer Fish; Mark Smalley

**Board Members Absent:** None

**Also Present by Conference/Video Call:** Kayla Adkins, Board Secretary; Alexi Papalossi, Recorder; Yvonne Wong, AOC HR Officer; Liana Garcia, Government Affairs Director for the AOC; Karina Taylor, Applicant #24-01

**Call to Order:**

**Approval of Minutes:**

August 6, 2024 – Public Meeting Minutes

**MOTION: Mark Smalley moved to approve the public meeting minutes of the August 6, 2024, meeting.** The motion was seconded by Jennifer Fish and passed unanimously. The minutes stand approved. **CORP 2024-33**

**Legislative Update**

During the August 6, 2024, Local Board meeting, the Chair requested that Liana Garcia, Government Affairs Director for the Administrative Office of the Courts, attend the next CORP Local Board Meeting to provide a final update on CORP-related 2024 legislation.

Ms. Garcia reported on CORP-related 2024 legislation and provided a status update on the following Bills:

House Bills:

HB2024, HB2203, HB2206, HB2208, HB2378

Senate Bills:

SB1358

**Consideration of Accidental Disability - IME Request  
Karina Taylor – Application #24-01**

The Board received Application #24-01 for Accidental Disability pension from Karina Taylor in July of 2024.

- The applicant is a Maricopa County Adult Probation Officer with 1.851 years of service.
- The applicant identified the disabling condition as continued pain from the “tear of the metacarpophalangeal joint ulnar collateral ligament on the right thumb.”
- Ms. Taylor was notified via certified letter that the Board would consider her application at this meeting and of the applicant’s right to attend.
- The applicant initialed the Waiver of Confidentiality provision, to allow discussion of the medical condition in an open public meeting.
- The applicant provided medical reports of findings and treatment with the application. The application and medical reports are provided for the Board. The criteria for Accidental Disability pension per A.R.S. §38-881.01 are:
  - "Accidental Disability" means a physical or mental condition that the local board finds totally and permanently prevents an employee from performing a reasonable range of duties within the employee's department and was incurred in the performance of the employee's duties.
- A copy of A.R.S. §38-881.01 governing Local Board consideration of applications for Accidental Disability is included for reference purposes.

#### Pre-Existing Conditions:

The applicant’s physical exam dated August 11, 2022 is provided. The exam report identified the following pre-existing conditions: ablations for SVT, migraines without neurological symptoms, and chronic back pain (MRI normal).

#### **DISCUSSION:**

The Chair requested the Board Secretary to reference A.R.S. §38-881 section A-1 to clarify the requirements to qualify for Accidental Disability pension.

The Chair inquired whether the Board had received notice of termination specifically due to Ms. Taylor’s injury. The Board Secretary stated that she had been in contact with Maricopa County and confirmed via phone that the member was terminated for reasons related to accidental disability. The Chair requested that the Board Secretary obtain written documentation of the Accidental Disability termination date.

Mr. Hathcock asked if there was an incident report that was completed by the employer, to which the Board Secretary replied that Maricopa County did not provide such documentation. Ms. Fish confirmed that the Employer’s Report of Industrial Injury is used as the incident report in most cases.

The Chair invited Ms. Taylor to make a statement to the Board. Ms. Taylor expressed her dismay with the incident, citing that she enjoyed her job and intended to retire as a Probation Officer.

She indicated that she experiences pain on a daily basis and has little to no use of her right hand and arm.

The Chair asked Ms. Taylor if she sought any accommodation from her employer following her injury. Ms. Taylor stated that she requested accommodation and was denied and that she has not been medically cleared to return to work due to her pain. The Chair continued and asked Ms. Taylor if she had applied for Social Security Disability. Ms. Taylor stated that she had started the processes but had not received a final determination from the Social Security Office.

Mr. Hathcock addressed Ms. Taylor, asking if she ever returned to work following her injury, and asked her to confirm her final termination date, to which she replied she did not return to work and was terminated in June of 2024.

Mr. Hathcock asked Ms. Taylor if she would consider returning to a probation officer position that is unarmed. Ms. Taylor stated that Maricopa County won't let her go back to work. Ms. Taylor added that she is not able to defend herself, using one arm. Mr. Hathcock referenced the doctor's note that Ms. Taylor submitted to the Board Secretary last week indicating some mental health issues. Ms. Taylor explained that she has not been sleeping well due to the pain since the injury, and she is currently seeing a therapist. The Chair clarified that Ms. Taylor's disability application was for a physical issue, not for a mental health issue.

Mr. Hathcock inquired about the medical treatment Ms. Taylor had received thus far, specifically any surgeries. Ms. Taylor explained that she has already received multiple surgeries and may have more in the future in an attempt to alleviate her pain from Chronic Regional Pain Syndrome (CRPS), which is caused by the injury. She continued, stating that her medical providers informed her that her thumb and index finger may never have full mobility again. Mr. Mabery asked if she had mobility in her arm or if the pain was only in her hand. Ms. Taylor explained that she had experienced nerve pain throughout her arm and neck.

Mr. Mabery requested additional context regarding the nature and cause of the injury provided on the application. Ms. Taylor explained that her office received new office chairs that were not as stable as the previous ones and that when meeting with a probationer in a conference room she fell from the chair. Ms. Taylor confirmed for Mr. Mabery that the conference room where the injury occurred was carpeted.

The Chair explained the Independent Medical Evaluation (IME) process to Ms. Taylor and the Board would decide on her disability based on the IME report.

**Motion: Scott Mabery moved to refer Applicant #24-01 for an Independent Medical Evaluation for Accidental Disability.** The motion was seconded by Jason Hathcock and passed unanimously. **CORP 2024-34**

### **Notice of Retiree Return to Work – Cheryl Piper**

The Board received a Notice of Retiree Return to Work from the Maricopa County Judicial Branch for Cheryl Piper, indicating that Ms. Piper retired from the Maricopa County Adult Probation

Department on September 8, 2018, with an effective CORP retirement date of October 1, 2018. She had since accepted an employment offer with the Maricopa County Judicial Branch and returned to work on March 21, 2022, in a non-CORP-designated position as a Program Specialist.

Copies of A.R.S. § 38-884.N-O. and Ms. Piper's current position description were provided to the Board.

The Board Secretary noted that Ms. Piper appeared eligible to continue receiving a CORP pension because she returned to work in a non-CORP-designated position after retirement.

**MOTION: Jason Hathcock moved that the Board received a Notice of Retiree Return to Work for Cheryl Piper and found that: (1) Ms. Piper is eligible to continue receiving a CORP pension; (2) Ms. Piper's employer, Maricopa County Judicial Branch, is not responsible for paying the CORP alternate contribution rate on her behalf because she returned to work in a non-CORP-designated position.** The motion was seconded by Mark Smalley and passed unanimously. **CORP 2024-35**

#### **Notice of Retiree Return to Work – Clint Hill**

The Board received a Notice of Retiree Return to Work from the Maricopa County Judicial Branch for Clint Hill, indicating that Mr. Hill retired from the Maricopa County Judicial Branch Adult Probation Department on September 15, 2023, with an effective CORP retirement date of October 1, 2023. He had since accepted an employment offer with the Maricopa County Judicial Branch and returned to work on August 12, 2024, in a CORP-designated position as an Adult Surveillance Officer.

Copies of A.R.S. § 38-884.N-O. and Mr. Hill's current position description were provided to the Board.

The Board Secretary noted that Mr. Hill returned to work in a CORP-designated position (Adult Surveillance Officer) more than six months after retirement, so it appeared he may continue receiving his CORP pension. Additionally, his employer is responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a CORP-designated position.

**MOTION: Jennifer Fish moved that the Board received a Notice of Retiree Return to Work for Clint Hill and found that: (1) Mr. Hill is eligible to continue receiving a CORP pension; (2) Mr. Hill's employer, Maricopa County Judicial Branch, is responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a CORP-designated position.** The motion was seconded by Scott Mabery and passed unanimously. **CORP 2024-36**

#### **Notice of Retiree Return to Work – David Hogue**

The Board received a Notice of Retiree Return to Work from the Maricopa County Judicial Branch for David Hogue, indicating that Mr. Hogue retired from the Maricopa County Sheriff's Office on

June 19, 2024, with an effective CORP retirement date of July 1, 2024. He had since accepted an employment offer with the Maricopa County Judicial Branch and returned to work on August 5, 2024, in a non-CORP-designated position as a Security Officer.

Copies of A.R.S. § 38-884.N-O. and Mr. Hogue’s current position description were provided to the Board.

The Board Secretary noted that Mr. Hogue appeared eligible to continue receiving a CORP pension because he returned to work in a non-CORP-designated position after retirement.

**MOTION: Scott Mabery moved that the Board received a Notice of Retiree Return to Work for David Hogue and found that: (1) Mr. Hogue is eligible to continue receiving a CORP pension; (2) Mr. Hogue’s employer, Maricopa County Judicial Branch, is not responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a non-CORP-designated position.** The motion was seconded by Mark Smalley and passed unanimously. CORP 2024-37

**Notice of Retiree Return to Work – Mark Valdez**

The Board received a Notice of Retiree Return to Work from the Coconino County Judicial Branch for Mark Valdez, indicating that Mr. Valdez retired from the Coconino County Judicial Branch Adult Probation Department on June 30, 2023, with an effective CORP retirement date of July 1, 2023. He had since accepted an employment offer with the Coconino County Judicial Branch and returned to work on June 10, 2024, in a CORP-designated position as a Probation Officer Lead.

Copies of A.R.S. § 38-884.N-O. and Mr. Valdez’s current position description were provided to the Board.

The Board Secretary noted that Mr. Valdez returned to work in a CORP-designated position (Probation Officer Lead) more than six months after retirement, so it appeared he may continue receiving his CORP pension. Additionally, his employer is responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a CORP-designated position.

**MOTION: Mark Smalley moved that the Board received a Notice of Retiree Return to Work for Mark Valdez and found that: (1) Mr. Valdez is eligible to continue receiving a CORP pension; (2) Mr. Valdez’s employer, Coconino County Judicial Branch, is responsible for paying the CORP alternate contribution rate on his behalf because he returned to work in a CORP-designated position.** The motion was seconded by Jason Hathcock and passed unanimously. CORP 2024-38

**Acknowledgment of CORP Physical Exam Final Letter:**

<b>Name</b>	<b>County</b>	<b>Letter Issue Date</b>
Jaime Marquez	Navajo	7/05/2024

The Chair noted, for the record, that the CORP physical examination report for Jaime Marquez was not received within 60 days of receiving their membership application and that a final letter requesting the examination report was sent via certified mail.

**Approval of Membership:**

The Board voted on the approval of the following requests for membership:

<b>Name</b>	<b>County</b>	<b>Effective Enrollment Date</b>
Izzabela Goerke	Cochise	8/11/2024
Alexis Pennington	Cochise	7/28/2024
Tessa Carr-Studer	Coconino	5/25/2024
Anna Faria	Coconino	8/11/2024
Carolyn Kidd	Coconino	8/11/2024
Allan Anton	Maricopa	4/29/2024
Shelby Bonifay	Maricopa	8/4/2024
Steven Conolly	Maricopa	4/1/2024
Demetrius Crittendon	Maricopa	4/29/2024
Cesar Duran	Maricopa	8/18/2024
Christopher Hamiter	Maricopa	7/22/2024
Madison Kenick	Maricopa	4/29/2024
Abby Lee	Maricopa	7/08/2024
Vanessa Roberts	Maricopa	5/27/2024
Byron Salazar	Maricopa	7/21/2024
Chloe Sherman	Maricopa	8/4/2024
Cassandra Lara	Mohave	8/18/2024
Jaime Marquez	Navajo	8/4/2024
Alexander Bojko	Pima	6/23/2024
Rebecca Lichliter	Pinal	5/13/2024
Latoyia Dillinger	Yuma	8/18/2024
Norma Gonzalez	Yuma	8/11/2024
Joseph Hall	Yuma	8/11/2024

Upon reviewing the CORP membership spreadsheet provided to the Board, Mr. Hathcock asked if the Board received Rebecca Lichliter’s previous CORP association dates. The Board staff confirmed that the Board still has not heard back from PSPRS about Ms. Lichliter’s CORP membership dates. Mr. Hathcock suggested that the Board should keep Ms. Lichliter flagged until PSPRS provides the membership dates to prove that Ms. Lichliter should be in Tier 1. The Chair recommended that the Board make a motion to approve membership for the applicants listed in the agenda contingent upon receiving Ms. Lichliter’s membership dates from PSPRS.

**MOTION: Jason Hathcock moved to approve the 23 applicants listed on the agenda for this meeting for membership in CORP pursuant to A.R.S. § 38-893.D. and to note for the record that the physical examinations for Alexis Pennington, Anna Faria, Carolyn Kidd, Steven Conolly, Christopher Hamiter, Byron Salazar, Cassandra Lara, Alexander Bojko, Rebecca Lichliter, and Joseph Hall identified a physical or mental condition or injury that existed or occurred before their dates of membership in the plan, pending prior service dates for Rebecca Lichliter. The motion was seconded by Jennifer Fish and passed unanimously. CORP 2024-39**

### **Membership Audit:**

During the August 6, 2024 Local Board meeting, The Chair requested the Local Board staff to provide an update on the missing information discovered in the 2024 audit at the CORP Local Board Meeting on September 3, 2024. The outstanding discrepancies had been resolved and completed as outlined below.

#### **Graham**

- Requested and received 1 enrollment form and physical exam

#### **Maricopa**

- Requested and received 1 enrollment forms
- Physical exam final letter sent via certified mail to member

#### **Pima**

- Requested and received 3 enrollment forms
- Physical received from 1 member
- Physical exam final letter sent via certified mail to 2 members

#### **Yavapai**

- Requested and received 2 enrollment forms and physical exams

### **Future Agenda Items:**

#### **Call to the Public:**

The meeting was adjourned at 10:49 a.m.

Transcribed September 3, 2024