



2015

# Trustee Election

## Election Schedule

**January 1-10, 2015 – Election voting instructions and materials mailed to members**

**January 31, 2015 – Last day votes accepted (post-marked for paper ballots)**

**February 6-9, 2015 – Results of election submitted to PERA by vendor**

**February 12, 2015 – PERA issues the certification of results and newly elected trustees are seated on the board**

## 10 candidates file for PERA board seats

Ten individuals have filed their candidacy for the five elected positions on PERA's Board of Trustees. All PERA active members and benefit recipients will have the opportunity to vote for the candidates of their choice during the month of January, with the winners announced the following month.

Filing for the three seats representing General Fund and Correctional Fund active members are Paul Bourgeois, John Carlson, Thomas Rupp, Clinton Schumacher, Thomas Stanley and Lori Volz. In the retiree/annuitant race are Ross Arneson, Marion Conwell and Gene

VanOverbeke, while David Metusalem is the lone candidate for the Police and Fire seat.

You will find short biographies of the candidates and the answers to three questions posed by PERA inside this newsletter. All material was supplied by the candidates, who are listed in alphabetical order for each race.

The three questions are:

1. What do you think should be the primary role of a PERA Trustee?
2. How do you think you could contribute to PERA as a member of the Board of Trustees? and
3. Do you have any additional comments?

## Retiree, Survivor and Disabilitant Candidates

### Ross E. Arneson

112 Ellis Avenue  
Mankato, MN 56001  
barneson@charter.net  
(507) 327-5551

#### Occupation:

Blue Earth County Attorney-Retired as of 1/5/15

#### Education and Training:

Bachelors degrees in Business and English from University of Minnesota-1976. Juris Doctorate from William Mitchell College of Law-1981.

#### Experience:

PERA trustee for over a decade representing actives starting in 1999. Blue Earth County Attorney since 1987-2015. Assistant Blue Earth County Attorney, 1983-1987. Assistant Watonwan County Attorney, 1981-1983. Northwestern

National Life Insurance Company-Group Underwriter and Contract Analyst, 1977-1980. Adjunct Professor-Minnesota State University-Mankato. Board of Directors-Minnesota County Attorneys Association. PERA Finance Committee.

1. Advocate policies that ensure PERA members will receive their scheduled benefits upon retirement.
2. While serving as a PERA trustee for over a decade, representing actives, I advocated for continuance of a traditional pension plan for public employees (as opposed to switching to a 401K style "defined contribution" plan where pension risks are passed on to the employees) and adequate contributions to ensure adequate funds to pay retirement benefits. I would continue that advocacy as a trustee representing retired members.

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**You can vote by mail, OR the easy way—online or by phone. Once you have received your voting materials, simply log on to mnpera.org and click the e-ballot icon, or follow the ballot instructions to vote by touch-tone phone. Voting in our trustee election is simple, secure and convenient.**



*This is Your PERA—make your voice heard*

## Consider our trustee candidates carefully, and then **VOTE**

### President's Message



*Don Rambow*

**Don Rambow**  
**President**  
**PERA Board of Trustees**

**V**oting – is a privilege, obligation, responsibility, and duty in our society. While voters seem to get excited about a Presidential election and willingly debate each candidate's merits, it is in fact your "local" elections which have the greatest impact on you and your livelihood. Election results are determined by those that take the time to vote.

It is time for PERA to conduct its "local" election. Members will directly choose five PERA Board members in January.

The PERA Board of Trustees, including these newly elected members, will make significant decisions in the coming months including:

- ➔ Selection of the next Executive Director
- ➔ Legislative challenges
- ➔ Challenges to the organization's fundamental mission

It is disturbing that, over the last four elections, membership participation in these elections has steadily declined to a dismal 12.6 percent. Only 29,367 members, out of 233,382, took time to cast ballots in 2011. In 2008, 75 percent of Minnesota eligible voters took the time to vote in the Presidential contest. I know our membership can do much better than 12 percent! Please become engaged and vote for the candidates you believe will best and most effectively serve the Board of Trustees.

Voting is easy. You can vote by mail, phone, or online.

Take a few moments and read the information about each of the candidates. Then, make YOUR VOTE count.

We look forward to having a full board in 2015 so we can move forward with the important work of governing YOUR pension plans.

## Police and Fire Plan Candidate

### David Metusalem

425 Grove Street  
Saint Paul, MN 55101  
david.metusalem@co.ramsey.mn.us  
(651) 266-9311

#### Occupation:

Peace Officer, Ramsey County Sheriff's Office

#### Education and Training:

Master's Degree in Public Administration from Hamline University. Bachelor's Degree from Metropolitan State University. Currently, I am enrolled in a certificate program in risk management at Stanford University.

#### Experience:

I have served in law enforcement for 28 years and held senior management positions including Chief Deputy over the past 19 years. My experience includes managing complex financial matters and engaging in legislative advocacy. As a deputy, I served as lead union steward for several years and then as a business agent for the Teamsters Local 320. I was previously a licensed insurance agent, specializing in fixed indexed annu-

ities. Effectively advising clients regarding these products required me to gain in depth knowledge of financial markets. In addition, I have served as an adjunct professor in labor relations at Hamline University.

1. To fulfill all of the duties required by law.
2. I will be a strong voice for safeguarding our pensions for the future.
3. The future of public pensions is no longer solely about fund performance and accurate actuarial calculations. The fervor of citizens, politicians, and advocacy groups that have long opposed defined benefit programs has never been stronger. While PERA has led the way in charting a fair and balanced approach to correcting funding deficiencies, this has not slowed the tide against public pensions. Unfortunately, our adversaries often characterize our pension similarly to those that are solely taxpayer funded and shouldering a considerable deficiency with no solution in sight. The fact that we contribute to our pension is sadly never included. Clearly, we need to remain vigilant and be strategically prepared to counter these attacks. If elected, I will make it my mission to be a strong advocate for protecting the pension we were promised.

### Public Employees Retirement Association of Minnesota

Toll Free—1-800-652-9026, or 651-296-7460, Between 8:00 a.m. and 4:30 p.m.

Fax Number—651-297-2547

Internet—www.mnpera.org

Mary Most Vanek—Executive Director

This document is available in alternative formats to individuals with disabilities by calling 1-800-652-9026 or through the Minnesota Relay Service at 1-800-627-3529.

**PERA is an Equal  
Opportunity Employer**

## Active General Plan and Correctional Plan Candidates

### Paul Bourgeois, CPA

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Waconia, MN 55387  
paul.bourgeois@minnetonka.k12.mn.us  
(952) 401-5024

#### Occupation:

Executive Director of Finance & Operations, Minnetonka ISD 276.

#### Education and Training:

BS in Business Administration, UW-Stevens Point, December 1982.  
BA in Accounting, UW-Green Bay, May 1986. Wisconsin CPA License 11758, June 1989.

#### Experience:

Executive Director of Finance & Operations, Minnetonka ISD 276, April 2007-present. Vice President Corporate Services, WPPI Energy, September 2003-March 2007. Chief Financial Officer, Rochester ISD 535, June 1994-August 2003. Board of Directors, Rochester Public Utilities, January 2001-August 2003. Assistant Superintendent-Business, San Lorenzo Public Schools, Administrator-Fiscal Services, Sacramento Public Schools, Director of Accounting, Sacramento Public Schools, District Accountant, Santa Barbara Public Schools, April 1987-June 1994.

1. A Trustee must ensure that the Trust is operated in a manner that ensures the benefits covenanted to employees are paid as promised. When public employees decide to sign on for employment and then stay in public employment throughout their careers, they plan their financial futures around the benefits that have been promised to them throughout their careers. A Trustee absolutely must make sure the rug is not pulled out from under those employees, and that those promises of retirement security are kept.

2. I have been fortunate to be able to run the business operations in such a manner that we were rated Aaa by Moody's for most of my tenure in Rochester, and currently are rated Aaa in Minnetonka. I am very familiar with financial markets, having issued over \$450 million in bonds over the years. I have 20 years of experience since 1994 successfully running self-insured Health and Dental Benefit Plans. I would also like to continue to bring the perspective of a school district employee to the PERA Board. It needs to be represented, as school district employees make up a large percentage of PERA members.

3. We absolutely MUST keep the promises covenanted to members.

### John Carlson

Rochester Public Schools (Independent School District #535)  
615 7th Street SW  
Rochester, MN 55902  
jocarlsn@rochester.k12.mn.us  
(507) 328-4262

#### Occupation:

Controller at Rochester Public Schools

#### Education and Training:

Bachelor of Business Administration from University of Minnesota (2000) with a major in Finance. Master of Business Administration from University of Minnesota (2005) with a major in General Management.

#### Experience:

I have worked professionally in Rochester, MN since 1999 in a variety of management positions: Manager of Document Processing at Think Federal Credit Union; Director of Operations at Christ Community Church; Chief Financial Officer at Zumbro Valley Mental Health Center; and presently the Controller at Rochester Public Schools. I have prepared annual budgets ranging from below \$1 million to greater than \$250 million. I have been responsible for managing and investing excess cash to match the needs of each organization. I am currently serving a three-year elected Board term as Treasurer for Christ Community Church.

1. The primary role of a PERA Trustee is to provide broad oversight of the association, represent the membership in discussions and decisions, protect the assets of the organization, and assure compliance with Statutes. Each Trustee provides unique perspective to each decision. At the end of each vote, each Trustee will have voted independently but will support the majority's decision.
2. I am experienced in working "for" the Board in a variety of managerial positions over the last nine years as well as working "on" the Board over the last three years. I am able to listen to discussion and ask questions. I believe each member of the Board provides insight and value. I am also very aware of the differences in duties between the Board and its executive director and I respect those boundaries as a Board member.
3. I am excited to potentially be able to serve the membership through this opportunity. I want to make sure PERA is sustainable and providing the promised benefits to all its members.

### Thomas Rupp

Hennepin County Government Center A-2301  
300 S 6th Street  
Minneapolis, MN 55487  
thomas.rupp@hennepin.us(612) 348-9256

#### Occupation:

Financial Management Analyst

#### Education and Training:

Master of Public and Nonprofit Administration-Metropolitan State University. Charter School Board Training-St. Thomas University

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**Experience:**

River's Edge Academy Board of Directors-July 2013-Present.  
Hennepin County Office of Budget and Finance-October  
2012-Present. Hennepin County 2009-present

1. The primary role of a PERA Trustee should be to fairly represent every member no matter what their age or employment status, educate members and nonmembers, correct misinformation about pensions, and to advocate for a strong solvent pension for employees and retirees.
2. When I was 16 years old, I started saving for retirement. I understand the importance of planning and preparing for financial security as well as having a long view on the subject. As a member of the Board of Trustees, I will bring a balanced perspective having worked as a union employee, served on a school board, analyzed budgets, and a belief that long-term health and sustainability of our defined benefit system is essential to a strong workforce and a secure retirement.
3. I am a third generation pensioner; my grandmother earned pensions from PERA and TRA, and my mother earned a pension as a nurse. Continued support and education throughout our members' careers is equally important as the paycheck. Long term solvency and sound financial decisions in good years and bad will ensure continued pension benefits for our retirees, employees, and the following generations of workers.

**Clinton Dean Schumacher**

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Chatfield, MN 55923  
cd.schumacher@smmpa.org  
(507) 292-6462

**Occupation:**

Southern Minnesota Municipal Power Agency-Special Projects Engineer

**Education and Training:**

University of Wisconsin-Platteville (2006). Bachelor of Science-Mechanical Engineering. Bachelor of Science-Business Administration

**Experience:**

PERA Board of Trustees since May 2013; Special Projects Engineer-Southern Minnesota Municipal Power Agency (2006-Present)

1. The primary role of a PERA trustee should be to collaborate with fellow trustees to establish policies and objectives that guide the sound operations of PERA. The policies and objectives set forth should carefully balance the short term needs against the long term stability and health of the organization. The trustees should tailor the policies and objectives set forth such that the outcome of their implementation is fair and equitable to all stakeholders.
2. A younger-person's perspective is an asset that I currently bring and would continue to bring to the Board of Trustees.

At 33 years old, I have a vested interest and a significant appreciation for the preservation of future benefits. While having a long term perspective, I also have an appreciation for the importance of providing stable and equitable benefits to those who currently or will soon rely on PERA for their retirement income. I may not have the depth of experience that my elders have, but I am no less passionate about bringing a high level of accountability, integrity, and professionalism to the trustee role.

3. Given the opportunity to serve again, I will continue doing my best to provide PERA stakeholders with the highest level of service possible.

**Thomas Stanley**

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Duluth, MN 55802-1298  
stanleyt@stlouiscountymn.gov  
(218) 726-2323

**Occupation:**

Senior Attorney, Civil Division-St. Louis County Attorney's Office

**Education and Training:**

University of Minnesota, Duluth-M.B.A. 2006. University of Michigan Law School-J.D. 1989. University of Notre Dame-B.A. Government and International Relations 1987

**Experience:**

Attorney with the St. Louis County Attorney's Office, Civil Division, since 2003; public defender for seven years and in private legal practice for five years. I am the President of the 11th District Bar Association Board of Directors (Minnesota State Bar Association) and a Trustee for AFSCME Local 3761 (previously, Treasurer). I have also served on a number of non-profit and community boards.

1. The primary role of a PERA Trustee should be transparent stewardship. The solvency of the fund for current and future retirees is the paramount consideration. To ensure sufficient assets, the Trustees must make wise and informed decisions regarding management oversight, member requests and legislation that can impact the fund. Such decisions must be made in a fair manner, utilizing a fair process, in which the integrity of the Board is visible to PERA members.
2. With more than 20 years of legal service, and a masters degree in business administration, I bring depth and breadth of knowledge to the Trustee position. My education and experience, along with a background in human resources management, allow me to understand the budget reports, organizational structure, investments and accounting of PERA, and help me fulfill my duties with impartial judiciousness and compassion.
3. As an attorney in public service, I have dedicated my career to improving and enhancing the lives of those in

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**General/Correctional Candidates** \_\_\_\_\_ (Continued from Pg. 4)

my community and beyond. As a Trustee since 2013, I have approached my Board responsibilities with similar diligence, candor and humility, working for, and on behalf of, my fellow public servants. I relish the opportunity to continue this work as a PERA Trustee.

**Lori Volz**

47595 97th Street  
Blue Earth, MN 56013  
Lori.Volz@alschools.org  
(507) 379-4809

**Occupation:**

Executive Director of Finance & Operations

**Education and Training:**

Master of Science Degree in Educational Leadership-Minnesota State University Mankato 1996. Bachelor of Science Degree in Business Administration-Minnesota State University Mankato 1983. Registered School Business Administrator (RSBA)-ASBO. Certified School Business Official-MASBO. Superintendent license-MN Department of Education

**Experience:**

31 years of experience in Public School Finance (Albert Lea Area School District, Austin School District and Blue Earth Area School District). Member of the MASBO Legislative Committee. 2009 MASBO School Business Official of the Year Award. 2005 Pinnacle Award Winner-ASBO International.

1. A PERA Trustee reviews proposed policy changes for the state legislature, investment performance of the state board of investments as well as member appeals of staff rulings. Actuarial data is reviewed periodically to assess the long term viability of the pension fund.

2. My many years of experience in school finance would be a tremendous asset on the PERA Board of Trustees. This experience includes investment oversight, work with policy development, human resources, collective bargaining experience as well as audit/actuarial practices. My recent experience on the MASBO Legislative Committee would also be a benefit to my role on the PERA board as proposed changes in policy would often be brought to the legislature from the PERA board. With my recent Superintendent licensure, I have expanded my experience in policy development.

3. Financial long term planning is a special interest of mine which would make this role very rewarding personally.

**Retiree/Annuitant Candidates** \_\_\_\_\_ (Continued from Pg. 1)

3. Management of PERA is vested in the board of trustees. Trustees must work to protect PERA so that actives and retirees have a secure pension, with the best possible pay-back and flexible benefit plans.

**Marion Conwell**

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Rogers, MN 55374  
ilovelucystreet@hotmail.com  
(763) 229-6014

**Occupation:**

Retired Office Paraprofessional – St. Michael-Albertville Schools

**Education and Training:**

I have always taken computer courses for many programs I used in my personal life and on my job. I don't want to ever stop learning and improving myself.

**Experience:**

I served as a member of many negotiation committees, as a union steward, SEIU Board Sargent at Arms and as a member of the board of trustees for SEIU Local 284. I was the treasurer at my church for 14 years.

1. To protect our pensions. Our members are counting on us, so that when they retire their money is safe.

2. I am very detail orientated. I was a member of SEIU's Board of Directors and served as a trustee. I performed quarterly audits of the books. I was always watching out for our members best interest and was not afraid to speak up if I had a question.

3. I have always believed in being involved and contributing to my community.

**Gene VanOverbeke**

4295 Lodgepole Drive  
Eagan, MN 55122  
gjvanoverbeke@gmail.com  
(651) 233-6949

**Occupation:**

Retired

**Education and Training:**

I hold B.S. degrees in Mathematics and Accounting and a

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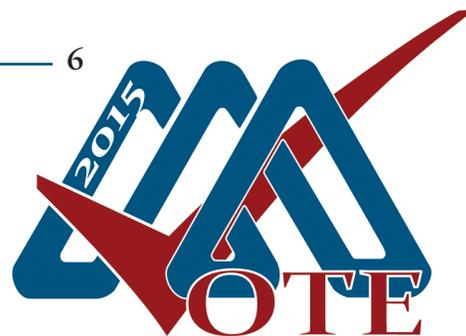
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November 2014

2015

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**Trustee Election**



**Retiree/Annuitant Candidates**

(Continued from Pg. 5)

MBA. Training includes numerous conferences and seminars through both the State and National Government Finance Officers Associations (GFOA). I hold an inactive Certified Public Accountant Certificate.

**Experience:**

I taught high school for four years over a six year period with a two year break to serve in the Army including nearly a year in Vietnam. I have served in municipal government finance and management for over 35 years and ISD 196 finance for a period of 14 months. Municipalities include Brooklyn Center, Brooklyn Park and Eagan. Over 30 years were spent at Eagan serving in various roles with a primary emphasis in finance. I was active on numerous boards and committees, and participated in various associations with leadership positions in the Minnesota GFOA including the office of president. I have also served as an elected school board member.

to all stakeholders. This should be done in a fashion that provides maximum benefits while ensuring long-term sustainability of the pension plan.

2. My background provides financial and management experience that would help me understand the issues faced by the Board and make sound decisions. I have extensive experience working with elected officials and in addressing public policy issues to reach mutually beneficial policies.

3. My background makes me an excellent candidate to serve on the Board. I have a life long history of public service and would like to continue that as a member of this Board. I am proud and supportive of PERA and its contributions to all stakeholders. I will work to maintain that status and relationship.

1. To carry out the fiduciary responsibilities as delineated in State Statutes to provide for the proper and lawful administration of PERA in a manner mutually beneficial