



PERA

Investments & Pensions Oversight Committee Election Process

*Senator Roberto “Bobby” J. Gonzales, Chair
Representative Patricia Roybal Caballero, Vice Chair*

October 31, 2023

*Diana Rosales Ortiz, Chair
Greg Trujillo, Executive Director*

PERA Board Election Authority

- NMSA 1978 10-11-130(B):
The retirement board consists of:
 - (1) the secretary of state;
 - (2) the state treasurer;
 - (3) four members under a state coverage plan to be elected by the members under state coverage plans;
 - (4) four members under a municipal coverage plan to be elected by the members under municipal coverage plans, provided one member shall be a municipal member employed by a county; and
 - (5) two retired members to be elected by the retired members of the association.
- C. The results of elections of elected members of the retirement board shall be certified at the annual meeting of the association. *Elections shall be conducted according to rules the retirement board adopts from time to time.*
- D. The regular term of office of the elected members of the retirement board is four years. The term of one retirement board member under a state coverage plan expires annually on December 31. The terms of retirement board members under a municipal coverage plan expire on December 31 of noncoinciding years in the pattern set by the retirement board. Members of the retirement board serve until their successors have qualified.
- NMAC 2.80.200.60, (Election of Retired Members), NMAC 2.80.800.70 (Election of Non-retired Board Members), NMAC 2.80.200.80 (Elections) lays out PERA Board Election process.
- PERA Board Elections are not governed by the NM State Election code.

NM PERA Board of Trustees

PERA is governed by a 12-member Board of Trustees. The Board is composed of:

State Members

Four Members under a state plan elected by state members;

- Diana Rosales Ortiz, Board Chair – NM Office of the Attorney General
- Paula Fisher, Vice Chair – Children Youth & Families Department
- Tony Garcia – NM Office of the Public Defender
- Juan Diaz – Workforce Solutions

Municipal Members

Three Members under a municipal plan elected by municipal members;

- Valerie Barela – City of Albuquerque
- Roberto Ramirez – Albuquerque Bernalillo County Water Authority
- Augustine Romero – City of Albuquerque

County Members

One Municipal Member employed by a county elected by municipal members;

- Shirley Ragin, Bernalillo County

Retired Members

Two Retired Members elected by PERA retirees

- Francis Page
- Loretta Naranjo Lopez – *Will be replaced by Steven Astorga in CY24*

Ex-Officio Members

The Secretary of State and the State Treasurer

- Laura Montoya, NM State Treasurer
- Maggie Toulouse Oliver, NM Secretary of State

Board Election Timeline - 2023

PUBLIC EMPLOYEES RETIREMENT ASSOCIATION OF NEW MEXICO
2023 Board Election Timeline
 Nominee/Candidate Checklist

Nominating Petitions

Date	Item
Wednesday, January 11, 2023	Nominating petitions available from Automated Election Services, 7000 Zenith Ct., Rio Rancho, NM 87144-6467
Monday, April 10, 2023	<i>Deadline for nominating petition signatures to be received at Automated Election Services by 5 p.m.</i>
Thursday, April 27, 2023	<ul style="list-style-type: none"> • PERA Board receives Report on Nominating Petitions from Automated Election Services and approves nominees • Nominees notified of results
Friday, May 26, 2023	<i>Deadline for candidate biographies and photographs in designated formats to be received at Automated Election Services, 7000 Zenith Ct., Rio Rancho, NM 87144-6467 by 5 p.m.</i>

Election Ballots

Date	Item
June 2023	Biographies and photos posted on PERA website
July 2023	Biographies and photos published in Round-the-Roundhouse and summer edition of <i>La Voz</i>
Friday, August 4, 2023	Ballots mailed out by Automated Election Services
Friday, September 15, 2023	<ul style="list-style-type: none"> • Deadline for ballots to be received at Automated Election Services' designated Post Office locked box by 12:00 p.m. • Ballot count completed by Automated Election Services
Thursday, September 28, 2023	<ul style="list-style-type: none"> • Certification of election results by PERA Board at 2023 PERA Annual Meeting • Newly elected Board Members notified
Friday, October 13, 2023	<ul style="list-style-type: none"> • Candidate's Financial Disclosure Statement due



Nominating Petition Process

- Resolution passed by the Board on an annual basis notifying the membership of a board election. Resolution is passed at the first Board meeting of the calendar year.
- Number of nominating petitions required are as follows:
 - Active Members – a minimum of 150 valid nomination signatures from the constituent group to be represented. **Only vested members are eligible to run for the Board.**
 - Retired Members – a minimum of 50 valid nomination signatures from PERA retirees.
 - Required nominating petition information is printed name, signature, current employer or employer retired from, along with one of the following identifiers:
 - Last 4 of Social Security Number
 - Date of Birth
 - PERA Identification Number
- A nomination that does not include one of these elements may not be counted. A signature shall include an electronic signature, in any digital format, from a single identifiable e-mail address.
- A member may sign more than one nominating petition for different candidates.
- Nominating petitions are sent to the contracted election vendor for verification.
- The five candidates with the highest number of nominations shall be included on the ballot, all others are eliminated. In the case of a nominating tie an election committee shall determine the names and order in which they are placed on the ballot by lottery or similar method.
- If only one member is nominated for a Board seat, the election shall be canceled, and that member shall automatically be declared the winner.

Board Election Timeline - 2023

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Election Ballot Process

- **Ballot eligibility – Retired Members:** only retired members under the Public Employees Retirement Act, Judicial Retirement Act or the Magistrate Retirement Act shall be eligible to participate in the election of retired board members.
 - Retirees of the Volunteer Firefighter Act and survivor beneficiaries are not eligible to participate in the election.
- **Ballot eligibility – Non-retired Members:** All active and inactive members are eligible to participate in the election of non-retired board members.
 - All active members who have filed a valid application for membership no more than 60 days prior to the election.
- **Independent Election Contractor** – responsible for mailing all ballots which are returned and tabulated by the vendor. No PERA staff or Board member is involved in the tabulating process. Independent election contractor notifies the election candidates, PERA Board and Executive Director of results .
- **PERA Board** – certifies election results at the PERA Annual Meeting in September. Successful candidate is sworn in at the first meeting in January of the next calendar year.
- **Board Vacancy** – NMAC 2.80.200.30 (A) requires the Board declare the position vacant. Notice is given to invite eligible individuals to apply for the vacancy within thirty (30) days of the publication of vacancy.
 - Members of the retirement board shall serve until their successors are appointed.
 - Vacancy shall be filled by the remaining members at a regularly scheduled board meeting within 90 days of declaring the vacancy.
 - The selected member shall be appointed to serve for the remainder of the vacated term.

Board Election Results - 2023

County Board Seat Election was canceled, Shirley Ragin was the only candidate to turn in petitions and was declared the winner.

PERA Board of Trustees Election Results - Retiree

Election Year: 2023

Retiree Member 4-Year Term

<u>Candidate</u>	<u>Votes</u>
Loretta Naranjo Lopez	4,854
Stephen Astorga	6,895
Spoiled	29
	<u>11,778</u>

Ballots mailed: 38,085 **Ballots Voted:** 11,778 **Participation:** 30.9%

Undeliverable: 550

10 yr avg. participation 26.3%

PERA Board of Trustees Election Results - State

Election Year: 2023

State Member 4-Year Term

<u>Candidate</u>	<u>Department</u>	<u>Votes</u>
Carolyn Huyn	State Police	759
Paula Fisher	Children, Youth & Families Dept.	1,288
Spoiled		5
		<u>2,052</u>

Ballots mailed: 34,946 **Ballots Voted:** 2,052 **Participation:** 5.9%

Undeliverable: 2,243 6.4%

10 Year Avg. participation: 9.3%