



HISTORICAL OVERVIEW OF SERS' BOARD

- Legislation effective October 1, 1953, established a Board make-up of three employee members, the Attorney General, and Auditor of State.
- Legislation effective July 1, 1984, established a Board make-up of four employee members, one retiree member, the Attorney General, and Auditor of State.
- Legislation effective September 15, 2004, established the current Board make-up of four employee members, two retiree members, two investment experts (appointed by Governor and Joint Senate/House), and a Treasurer of State designee.
- Agnes O'Keefe was the first retiree member of the Board in 1984.
- The longest tenured Board member in SERS history is Cathie Moss. She is currently at 18 years, 7 months (uninterrupted).
- Second longest is Jamie Rossler at 18 years, 3 months (uninterrupted, served as both employee member and investment expert).
- Dan Wilson comes in third at 17 years, 10 months (had gap where he didn't serve between 1996 and 2004 and again between 2008 and 2013). It should be noted that Dan has served on the Board in 4 different decades (the 1990's, 2000's, 2010's and 2020's).
- Barb Phillips comes in fourth at 17 years, 7 months (uninterrupted).
- There are several Board members tied for fifth. Barbara Overholser, Mary Kasunic, and Jeannie Knox all had 16 years on the Board. Mary Kasunic served as both an employee member of the Board as well as a retiree member and served in 4 different decades (1970's, 1980's, 1990's and 2000's).
- Other Board members with significant tenures were Berthe Weist (15 years), Alfred Kennish (12 years), H. Lewis Shambarger (12 years), George Mazzaro (12 years), Judy Kelley (12 years), and Orris Fields (12 years).
- The FY2023 Board is the most tenured overall, as the four longest-tenured Board members serve on the Board, as does Jim Haller (6 years, 8 months), Jeff DeLeone (6 years, 2 months), Frank Weglarz (5 years, 8 months), Hugh Garside (5 years, 2 months), and Matt King (3 years, 1 month).
- The most turnover on the Board occurred during the 2004-2005 timeframe, due in no small part to the expanded Board. Eight Board members were brought on to the Board during those years (Mark Anderson, Cathie Moss, Arlene Wilson, Jamie Rossler, Thomas Geyer, Paul Peltier, Barb Phillips, and Mary Ann Howell), none of whom had previously served on the Board.
- SERS has one multi-generational family representation in its history with Mr. James F. DeLeone serving as an Attorney General representative in 1963-64 and his son Jeffrey T. DeLeone serving as a Treasurer appointee since 2016.



Agnes O'Keefe



Cathie Moss



Jamie Rossler



Dan Wilson



Barb Phillips