



Date: April 8, 2021  
To: PERA Board of Trustees  
From: Beth Reed, Heather Schoenberger and Luis Lugo  
Subject: Education, Payments, and Membership Counts

**Educational programs and Individual conferences:**

Type of Program	February 2021	March 2021
Ready to Retire - Member Program (Webinar)	Events: 7 Attendees: 207	Events: 10 Attendees: 267
Hire to Retire - Member Program (Webinar)	Events: 7 Attendees: 128	Events: 5 Attendees: 91
Individual Member Counseling (Phone)	Sessions: 94	Sessions: 102
Employer Workshops	Events: 1 Attendees: 52	Events: 1 Attendees: 152

**Active Membership Counts – Defined Benefit Plans**

	<u>03/01/2021</u>	<u>04/01/2021</u>
Basic Plan	3	3
Police and Fire Plan	11,870	11,847
General Plan (Coordinated members)	151,893	151,920
Correctional Plan	3,874	3,859
MERF	6	6
Mpls. Police Relief / Fire Relief	0 / 0	0 / 0
SVF - Monthly / Lump Sum Benefits	46 / 3,751	46 / 3,756
Privatization <sup>1</sup>	2,056	2,042
Exempt Plan <sup>2</sup>	4,071	4,073
<b>Total Defined Benefit Plan Active Members</b>	<b>177,570</b>	<b>177,552</b>

**Active Membership Counts – Defined Contribution Plan**

4,574      4,587

<sup>1</sup> Non-contributing former members who can defer their accounts for enhanced benefits under privatized laws

<sup>2</sup> Retired and disabled members who have returned to work for a PERA-covered employer.

**Total Benefit Recipients:**

Type	11/01/2020	12/01/2020	01/01/2021	02/01/2021	03/01/2021	04/01/2021
Retirement	110,891	111,089	111,110	111,399	111,784	112,138
Survivor	11,102	11,113	11,133	11,128	11,191	11,227
Disability	2,838	2,831	2,813	2,812	2,814	2,838
<b>Total</b>	<b>124,831</b>	<b>125,033</b>	<b>125,056</b>	<b>125,339</b>	<b>125,789</b>	<b>126,203</b>

**Applications Received:**

Type	09/2020	10/2020	11/2020	12/2020	01/2021	02/2021
Retirement	648	545	633	698	503	561
Survivor	69	88	74	113	114	99
Disability	40	54	52	46	55	43
<b>Total</b>	<b>757</b>	<b>687</b>	<b>759</b>	<b>857</b>	<b>672</b>	<b>703</b>

**Refunds Paid:**

Month	Total
September, 2020	886
October, 2020	1,097
November, 2020	618
December, 2020	1,069
January, 2021	926
February, 2021	1,204