

**ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
BOARD OF RETIREMENT
2223 E. WELLINGTON AVENUE, SUITE 100
SANTA ANA, CA 92701**

**PERSONNEL COMMITTEE MEETING
Tuesday, April 23, 2024
1:00 P.M.**

Members of the Committee

Roger Hilton, Chair
Shawn Dewane, Vice Chair
Charles Packard
Richard Oates

Members of the public who wish to observe and/or participate in the meeting may do so (1) from the OCERS Boardroom or (2) via the Zoom app or telephone (information below) from any location.

OCERS Zoom Meeting Video/Teleconference Information	
<p>Join Using Zoom App (Video & Audio)</p> <p>https://ocers.zoom.us/j/81525757532</p> <p>Meeting ID: 815 2575 7532 Passcode: 766752</p> <p>Go to https://www.zoom.us/download to download Zoom app before meeting. Go to https://zoom.us to connect online using any browser.</p>	<p>Join by Telephone (Audio Only)</p> <p>Dial by your location</p> <ul style="list-style-type: none"> • +1 669 900 6833 US (San Jose) • +1 346 248 7799 US (Houston) • +1 253 215 8782 US (Tacoma) • +1 929 436 2866 US (New York) • +1 301 715 8592 US (Washington DC) • +1 312 626 6799 US (Chicago) <p>Meeting ID: 815 2575 7532 Passcode: 766752</p>
<p>A Zoom Meeting Participant Guide is available on OCERS website Board & Committee Meetings Page.</p>	

AGENDA

This agenda contains a brief general description of each item to be considered. The Committee may take action on any item listed on this Agenda; however, except as otherwise provided by law, no action shall be taken on any item not appearing on the Agenda. The Committee may consider matters included on the agenda in any order, and not necessarily in the order listed.

OPEN SESSION

- 1. CALL MEETING TO ORDER AND ROLL CALL**
- 2. BOARD MEMBER STATEMENT REGARDING PARTICIPATION VIA ZOOM (IF NECESSARY)
(Government Code section 54953(f))**
- 3. PUBLIC COMMENTS**

Orange County Employees Retirement System
April 23, 2024
Personnel Committee Meeting – Agenda

Members of the public who wish to provide comment during the meeting may do so by “raising your hand” in the Zoom app, or if joining by telephone, by pressing * 9 on your telephone keypad. Members of the public who participate in the meeting from the OCERS Boardroom and who wish to provide comment during the meeting may do so from the podium located in the OCERS Boardroom. When addressing the Committee, please state your name for the record prior to providing your comments. Speakers will be limited to three (3) minutes.

At this time, members of the public may comment on (1) matters not included on the agenda, provided that the matter is within the subject matter jurisdiction of the Committee; and (2) any matter appearing on the Consent Agenda.

In addition, public comment on matters listed on this agenda will be taken at the time the item is addressed.

CONSENT AGENDA

All matters on the Consent Agenda are to be approved by one action unless a Committee Member requests separate action on a specific item.

C-1 PERSONNEL COMMITTEE MEETING MINUTES

Personnel Committee Meeting Minutes

February 29, 2024

Recommendation: Approve minutes.

ACTION ITEMS

NOTE: Public comment on matters listed in this agenda will be taken at the time the item is addressed, prior to the Committee’s discussion of the item. **Members of the public who wish to provide comment in connection with any matter listed in this agenda may do so by “raising your hand” in the Zoom app, or if joining by telephone, by pressing * 9, at the time the item is called. Persons attending the meeting in person and wishing to provide comment on a matter listed on the agenda should fill out a speaker card located at the back of the Boardroom and deposit it in the Recording Secretary’s box located near the back counter.**

A-1 INDIVIDUAL ACTION ON ANY ITEM TRAILED FROM THE CONSENT AGENDA

A-2 PROPOSED 2024 PERSONNEL COMMITTEE MEETING SCHEDULE

Presentation by Cynthia Hockless, Director of Human Resources, OCERS

Recommendation:

Approve the staff proposed 2024 OCERS Personnel Committee Meeting Schedule

Or

Provide direction for alternative modifications.

A-3 UPDATE ON OCERS CLASSIFICATION AND COMPENSATION STUDY

Presentation by Cynthia Hockless, Director of Human Resources, OCERS, and Maggie Williams-Dalgart, MPA, SPHR, Gallagher

Recommendation:

Approve the comparable group as presented below for the Compensation Phase of the study:

1. California Public Employees Retirement System (CalPERS)
2. California State Teachers Retirement System (CalSTRS)
3. Los Angeles City Employees Retirement System (LACERS)
4. Los Angeles County Employees Retirement Association (LACERA)
5. Los Angeles Fire and Police Pensions (LAFPP)
6. County of Orange, California
7. San Bernardino County Employees Retirement Association (SBCERA)
8. San Diego City Employees Retirement System (SDCERS)
9. San Diego County Retirement Association (SDCERA)
10. San Francisco Employees Retirement System (SFERS)
11. City of Orange, California
12. City of Santa Ana, California

Or

Recommend and approve agencies that should be part of the comparable group for the Compensation Phase of the study.

INFORMATION ITEMS

Each of the following informational items will be presented to the Committee for discussion.

I-1 UPDATE ON OUTREACH REGARDING EMPLOYER DATA

Presentation by Suzanne Jenike, Assistant CEO of External Operations, OCERS

I-2 UPDATE ON REMAINING POSITION - MANAGER

Presentation by Suzanne Jenike, Assistant CEO of External Operations, OCERS

COMMITTEE MEMBER COMMENTS

CHIEF EXECUTIVE OFFICER/STAFF COMMENTS

COUNSEL COMMENTS

ADJOURNMENT

NOTICE OF NEXT MEETINGS

DISABILITY COMMITTEE MEETING

May 20, 2024

8:30 A.M.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM

2223 E. WELLINGTON AVENUE, SUITE 100

SANTA ANA, CA 92701

Orange County Employees Retirement System
April 23, 2024
Personnel Committee Meeting – Agenda

Page 4

REGULAR BOARD MEETING
May 20, 2024
9:30 A.M.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
2223 E. WELLINGTON AVENUE, SUITE 100
SANTA ANA, CA 92701

GOVERNANCE COMMITTEE MEETING
May 23, 2024
9:30 A.M.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
2223 E. WELLINGTON AVENUE, SUITE 100
SANTA ANA, CA 92701

AVAILABILITY OF AGENDA MATERIALS - Documents and other materials that are non-exempt public records distributed to all or a majority of the members of the OCERS Board or Committee of the Board in connection with a matter subject to discussion or consideration at an open meeting of the Board or Committee of the Board are available at the OCERS' website: <https://www.ocers.org/board-committee-meetings>. If such materials are distributed to members of the Board or Committee of the Board less than 72 hours prior to the meeting, they will be made available on the OCERS' website at the same time as they are distributed to the Board or Committee members. Non-exempt materials distributed during an open meeting of the Board or Committee of the Board will be made available on the OCERS' website as soon as practicable and will be available promptly upon request.

It is OCERS' intention to comply with the Americans with Disabilities Act ("ADA") in all respects. If, as an attendee or participant at this meeting, you will need any special assistance beyond that normally provided, OCERS will attempt to accommodate your needs in a reasonable manner. Please contact OCERS via email at adminsupport@ocers.org or call 714-558-6200 as soon as possible prior to the meeting to tell us about your needs and to determine if accommodation is feasible. We would appreciate at least 48 hours' notice, if possible. Please also advise us if you plan to attend meetings on a regular basis.

**ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
2223 E. WELLINGTON AVENUE, SUITE 100
SANTA ANA, CALIFORNIA**

**PERSONNEL COMMITTEE MEETING
Thursday, February 29, 2024
1:00 P.M.**

MINUTES

OPEN SESSION

Chair Hilton called the meeting to order at 1:06 P.M.

Recording Secretary administered the Roll Call attendance.

Attendance was as follows:

Present: Roger Hilton, Chair; Charles Packard, Board Member; Richard Oates, Board Member

Also Present: Steve Delaney, CEO; Brenda Shott, Assistant CEO of Internal Operations; Suzanne Jenike, Assistant CEO of External Operations; Manuel Serpa, General Counsel; Cynthia Hockless, Director of Human Resources; Jeff Lamberson, Director of Member Services; Silviu Ardeleanu, Director of Member Services; Anthony Beltran, Audio Visual Technician; Amanda Evenson, Recording Secretary

PUBLIC COMMENT

None.

CONSENT AGENDA

C-1 COMMITTEE MEETING MINUTES:

Personnel Committee Meeting Minutes

November 15, 2023

Recommendation: Approve minutes.

A **Motion** by Mr. Packard, **seconded** by Mr. Oates, to approve staff's recommendation to approve the minutes.

The motion passed **unanimously**.

ACTION ITEMS

A-1 INDIVIDUAL ACTION ON ANY ITEM TRAILED FROM THE CONSENT AGENDA

No items were trailed from the Consent Agenda.

Orange County Employees Retirement System
February 29, 2024
Personnel Committee Meeting

A-2 PROPOSED 2024 PERSONNEL COMMITTEE MEETING SCHEDULE

Presentation by Steve Delaney, Chief Executive Officer, OCERS

Recommendation:

Approve the staff proposed 2024 OCERS Personnel Committee Meeting Schedule

Or

Provide direction for alternative modifications.

The Committee provided direction for alternative modifications to the Proposed 2024 Personnel Committee Meeting Schedule and to resume discussion at the next Personnel Committee meeting on April 23, 2024.

A-3 REVIEW OF THE PERSONNEL COMMITTEE CHARTER

Presentation by Cynthia Hockless, Director of Human Resources, OCERS

Recommendation: Approve, and recommend the Board adopt, revisions to the Personnel Committee Charter as presented.

A **Motion** by Mr. Packard, **seconded** by Mr. Oates, to approve, and recommend the Board adopt, revisions to the Personnel Committee Charter.

The motion passed **unanimously**.

INFORMATION ITEMS

I-1 OCERS BENEFIT CALCULATION PROCESSES - STAFFING IMPLICATIONS - PART ONE

Presentation by Suzanne Jenike, Assistant CEO, External Operations, and Jeff Lamberson, Director of Member Services, OCERS

The committee determined they did not want to approve additional staff positions, but instead directed the team to work directly with the employers to submit acceptable data. The team was further directed to report this matter to the Board.

COMMITTEE MEMBER COMMENTS

Mr. Packard complimented Ms. Jenike and her team for providing this information to the Committee.

CEO/COUNSEL/STAFF COMMENTS

None.

Chair Hilton **ADJOURNED** the meeting at 1:56 P.M.

Submitted by:

Submitted by:

Approved by:

Cynthia Hockless
Liaison

Steve Delaney
Secretary to the Board

Roger Hilton
Chair



Memorandum

DATE: April 23, 2024
TO: Members of the Personnel Committee
FROM: Cynthia Hockless, Director of Human Resources
SUBJECT: PROPOSED 2024 PERSONNEL COMMITTEE MEETING SCHEDULE

Recommendation

Approve the staff proposed 2024 OCERS Personnel Committee Meeting Schedule

Or

Provide direction for alternative modifications.

Background/Discussion

This memo outlines the suggested dates for the OCERS Board of Retirement's Personnel Committee meetings in 2024. Meetings are scheduled to commence at 9:30 A.M. on each specified date. While we may not require every date, we prefer to reserve them in advance.

RECOMMENDATIONS:

Personnel Committee Meetings – 9:30 A.M.

- Friday, June 21
- Wednesday, July 31
- Tuesday, August 27
- Tuesday, October 8
- Tuesday, December 10

ALTERNATE AVAILABLE DATES:

Personnel Committee Meetings – 9:30 A.M.

- Tuesday, October 15
- Tuesday, October 17

Attachment

1. Proposed 2024 Personnel Committee Meeting Schedule

Submitted by:



CH - Approved

Cynthia Hockless
Director of Human Resources

Proposed 2024 Personnel Committee Meeting Schedule

January						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
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28	29	30	31			

February						
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31						

April						
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August						
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September						
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October						
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November						
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December						
Su	Mo	Tu	We	Th	Fr	Sa
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15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Federal Holiday
Regular Board Meeting
Disability Committee Meeting
Strategic Planning Workshop
Investment Committee Meeting

Audit Committee Meeting
Building Committee Meeting
Governance Committee Meeting
Personnel Committee Meeting

Plotted Conferences				
Date Starts	Date Ends	Conference Org	Conference Name	Location
1/21/2024	1/22/2024	NCPERS	Pension Comm Summit	Washington DC
1/22/2024	1/24/2024	NCPERS	Legislative Conference	Washington DC
1/28/2024	1/30/2024	NAPO	Annual Pension and Benefits Seminar	Las Vegas, NV
2/24/2024	2/26/2024	NASRA	Winter Meeting	Washington DC
2/26/2024	2/27/2024	NIRS	Annual Conference	Washington DC
3/2/2024	3/5/2024	CALAPRS	General Assembly	Rancho Mirage
5/7/2024	5/10/2024	SACRS	Spring Conference	Santa Barbara, CA
5/19/2024	5/22/2024	NCPERS	Annual Conference & Exhibition (ACE)	Seattle WA
6/17/2024	6/19/2024	NCPERS	Chief Officers Summit	Nashville, TN
7/14/2024	7/17/2024	NAPO	ANNUAL CONVENTION	Nashville, TN
8/3/2027	8/7/2024	NASRA	Annual Conference	Pittsburgh, PA
8/18/2024	8/20/2024	NCPERS	Public Pension Funding Forum	Boston, MA
9/24/2024	9/26/2024	NCPERS	Public Pension HR Summit	Denver, CO
10/27/2024	10/30/2024	NCPERS	Public Safety Conference	Palm Springs, CA
11/3/2024	11/6/2024	CRCEA	Contra Costa (CCREA)	Contra Costa
11/12/2024	11/15/2024	SACRS	Fall Conference	Monterey, CA
N/A	N/A	NCPERS	FALL Conference	N/A



Memorandum

DATE: April 23, 2024
TO: Members of the Personnel Committee
FROM: Cynthia Hockless, Director of Human Resources
SUBJECT: UPDATE ON OCERS CLASSIFICATION AND COMPENSATION STUDY

Recommendation

Approve the comparable group as presented below for the Compensation Phase of the study:

1. California Public Employees Retirement System (CalPERS)
2. California State Teachers Retirement System (CalSTRS)
3. Los Angeles City Employees Retirement System (LACERS)
4. Los Angeles County Employees Retirement Association (LACERA)
5. Los Angeles Fire and Police Pensions (LAFPP)
6. San Bernardino County Employees Retirement Association (SBCERA)
7. San Diego City Employees Retirement System (SDCERS)
8. San Diego County Employees Retirement Association (SDCERA)
9. San Francisco Employees Retirement System (SFERS)
10. County of Orange, California
11. City of Orange, California
12. City of Santa Ana, California

Or

Recommend and approve agencies that should be part of the comparable group for the Compensation Phase of the study.

Background/Discussion

In the 2024 OCERS Business Plan under Talent Management, it states:

Initiative 1A: Pursue moving the workforce to be 100% employed by OCERS as a single agency.

- ***Continue the Classification and Compensation Study of the County positions at OCERS in partnership with the County of Orange.***

In March 2023, OCERS enlisted the services of Gallagher (formerly known as Koff & Associates) to spearhead a Classification and Compensation study of county-level positions. Georg S. Krammer, Managing Director and Compensation Consultant, was chosen to lead the study.

The primary objective of the study is to align OCERS Non-Direct (County) positions under a cohesive compensation system and philosophy. This initiative is anticipated to have a positive impact on morale, dedication, and efficiency among OCERS employees. Additionally, it aligns with the organization's pursuit of consolidating the workforce into a single agency.

The study consists of Four Phases. In Phase One of the project, we initiated communication meetings with the OCERS County team members, the County of Orange, and the Orange County Employees Association (OCEA) to discuss the overarching process. In this stage, team members were tasked with completing their Position Description Questionnaires (PDQs), which provided a structured format for detailing their responsibilities. Once filled out, these questionnaires underwent approval from both the employees' direct supervisors and managers. Gallagher conducted comprehensive reviews of all PDQs, arranging clarification sessions with various supervisors to ensure accuracy and completeness. Gallagher successfully concluded Phase Two of the project, which involved crafting new job descriptions. The consultant chosen for this task was Maggie Williams-Dalgart, Project Manager specializing in Compensation and Rewards Consulting at Gallagher.

We are progressing into Phase Three of the study, focused on pinpointing a labor market and formulating a compensation structure along with salary recommendations. Gallagher will conduct thorough salary surveys and gather market data for these purposes.

At the April 23, 2024, Personnel Committee meeting, Maggie Williams-Dalgart will provide an update on the Classification and Compensation study. The Committee will be tasked with reviewing and approving a list of recommended agencies to be used as the comparable group for the Compensation Phase of the study.

In Phase Four, Gallagher expects to present their final report by June of this year. As significant milestones are achieved, we will ensure to discuss them with the Personnel Committee and subsequently with the County of Orange Human Resources Department and the Orange County Employees Association (OCEA). Upon approval from all parties involved, and subject to the approval of the county-level employees, we will initiate the legislative process required to transition all employees under OCERS.

Attachments

1. Memo from Maggie Williams-Dalgart, Gallagher Consultant
2. Presentation from Maggie Williams-Dalgart, Gallagher Consultant

Submitted by:



CH - Approved

Cynthia Hockless
Director of Human Resources



To: Cynthia Hockless, Director of Human Resources
Orange County Employees Retirement System

From: Maggie Williams-Dalgart, Project Manager

Subject: Recommended Comparator Agencies for 2024 Salary Survey

Date: April 17, 2024

In 2023 the Orange County Employees Retirement System (OCERS) contracted with Gallagher (formerly Koff & Associates) to conduct a classification and compensation study of OCERS' positions that are allocated the County of Orange. The classification portion of the study is near conclusion and the project is moving into the compensation study phase, which includes Gallagher conducting the market survey. Prior to initiating the survey, the comparison agencies that will be included in the market survey need to be identified. In determining an appropriate labor market, it is recommended that characteristics about other agencies be examined to assess comparability to OCERS; the following are key characteristics used in making that examination:

Organizational Type, Structure, Size, and Staffing: Gallagher generally recommends that agencies of a similar type, size (in terms of staffing) and structure, and which provide similar services as OCERS, be used as comparators. This is an important factor, as when comparing jobs it is ideal to compare against organizations who provide the same type of services, as they are more likely to have a similar organizational structure and comparable job classifications.

Geographic Location/Labor Market: Today's labor market reality is that many agencies are in competition for the same pool of qualified employees because large portions of the workforce don't live in the communities they serve, are accustomed to lengthy commutes, and are more likely to consider changing jobs in a larger geographic area than in the past. Therefore, the geographic labor market area where OCERS may be recruiting from or losing employees to, is taken into consideration when selecting comparator organizations.

In addition to examining the characteristic discussed above, when developing a labor market for conducting surveys it is also important to consider other factors, such as whether OCERS has used certain agencies for past surveys, whether there are other organizations that OCERS often recruits candidates from or loses candidates to, and other historical or operational considerations. Following discussions with OCERS management staff, it is our firm's understating that OCERS has an identified labor market it has used in the past for its management classifications (non-County of Orange positions). Though OCERS has two separate employee groups (County and non-County employees), as an organization striving to create a single umbrella, it is important to remain consistent in developing a labor market, such that there is a similar labor market organization-wide. This approach provides for equity across the organization in applying the market values.

Following analysis of the characteristics discussed above, as well in consideration of OCERS past practices with labor market surveying, the following agencies are recommended as the labor market for the upcoming salary survey. While the majority of agencies are other retirement systems, also included are several local



Insurance | Risk Management | Consulting

Orange County Employees Retirement System
Salary Survey Comparators
Page 2

municipalities and the County of Orange. This mix of organizations provides a broad representation of retirement system organizations, the regional labor market (Los Angeles, San Bernardino, and San Diego counties), as well as the local labor market (Orange County).

Proposed comparator agencies for the 2024 salary survey:

1. California Public Employees Retirement System (CalPERS)
2. California State Teachers Retirement System (CalSTRS)
3. County of Orange
4. City of Orange
5. City of Santa Ana
6. Los Angeles City Employees Retirement System (LACERS)
7. Los Angeles County Employees Retirement Association (LACERA)
8. Los Angeles Fire and Police Pensions (LAFPP)
9. San Bernardino County Employees Retirement Association (SBCERA)
10. San Diego City Employee Retirement System (SDCERS)
11. San Diego County Retirement Association (SDCERA)
12. San Francisco Employees Retirement System (SFERS)

We appreciate the opportunity to conduct this review on behalf of OCERS. Please let us know if we can answer any questions.



**Classification & Compensation Study
Project Update**

April 23, 2024



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What is a Classification and Compensation Study?

- **“Class” Study:** The neutral process by which the responsibilities, duties, knowledge, skills, and abilities of individual positions are researched, analyzed, and documented to develop a classification system and structure which encompasses the organization’s jobs.
- **“Comp” Study:** The neutral process of examining the work of individual classifications relative to the labor market and to other classifications within the organization, to develop salary recommendations based on external competitiveness and internal equity principles.



Classification & Compensation Study Objectives

- Review Job Classifications for OCERS Non-Direct (County) positions to determine appropriate classification and compensation system that is more aligned with other retirement systems
- Integrate County positions into one comprehensive compensation system and philosophy
- Enhance recruitment processes and career pathing
- Ensure equitable and competitive compensation system



Classification Study:

- ✓ Meetings with Management & Project Team
- ✓ PDQ Completion & Employee Interviews
- ✓ Management Interviews
- ✓ Develop & Finalize Class Concepts/Structure
- ✓ Draft New Job Descriptions

Compensation Study:

- Identify/Finalize Labor Market
- Conduct Salary Survey/Collect Market Data
- Develop Salary Recommendations/Report

Study Milestones



Classification Concepts

Blueprint for developing the classification system and which defines classifications into a systematic structure based on the inter-relationship of duties performed, nature and level of responsibilities, and required knowledge, abilities, and experience.



Recommended Classifications/Series

Current Job Title/Job Family	Proposed Job Title
Accounting Technician	Accounting Technician
Accountant/Auditor I	Accounting Specialist
Accountant/Auditor II	Accountant
Senior Accountant/Auditor	Senior Accountant
Office Technician	Office Assistant
Office Specialist	Administrative Assistant
Executive Secretary I	Senior Administrative Assistant
Executive Secretary II	Executive Assistant
Staff Assistant	Human Resources Technician
Staff Specialist	Staff Specialist
Senior Staff Development Specialist	Training Specialist
IT Systems Technician I/II	IT Technician I/II
IT Network Engineer II	Network Engineer I/II
IT Systems Engineer II	Systems Engineer I/II
Senior Information Technologist	Information Technology Supervisor
N/A - New Concept	Software Engineer
Senior IT Applications Developer	Senior Software Engineer
IT Supervisor	Principal Software Engineer
Retirement Benefits Technician	Retirement Services Technician
Retirement Program Specialist	Retirement Services Specialist I/II
Senior Retirement Program Specialist	Senior Retirement Services Specialist
Retirement Benefits Program Supervisor	Retirement Services Supervisor
Disability Retirement Investigator	Disability Retirement Analyst I/II
Store Clerk	Support Services Assistant



Compensation Study: Recommended Labor Market

1. California Public Employees Retirement System (CalPERS)
2. California State Teachers Retirement System (CalSTRS)
3. County of Orange
4. City of Orange
5. City of Santa Ana
6. Los Angeles City Employees Retirement System (LACERS)
7. Los Angeles County Employees Retirement Association (LACERA)
8. Los Angeles Fire and Police Pensions (LAFPP)
9. San Bernardino County Employees Retirement Association (SBCERA)
10. San Diego City Employee Retirement System (SDCERS)
11. San Diego County Retirement Association (SDCERA)
12. San Francisco Employees Retirement System (SFERS)



Labor Market Characteristics

- Mix of retirement system agencies and local government (city/county)
- Reflects local (Orange County) and regional (LA, San Diego, San Bernardino) markets
- Retains continuity with the labor market used for the management group



Next Steps

Classification Study:

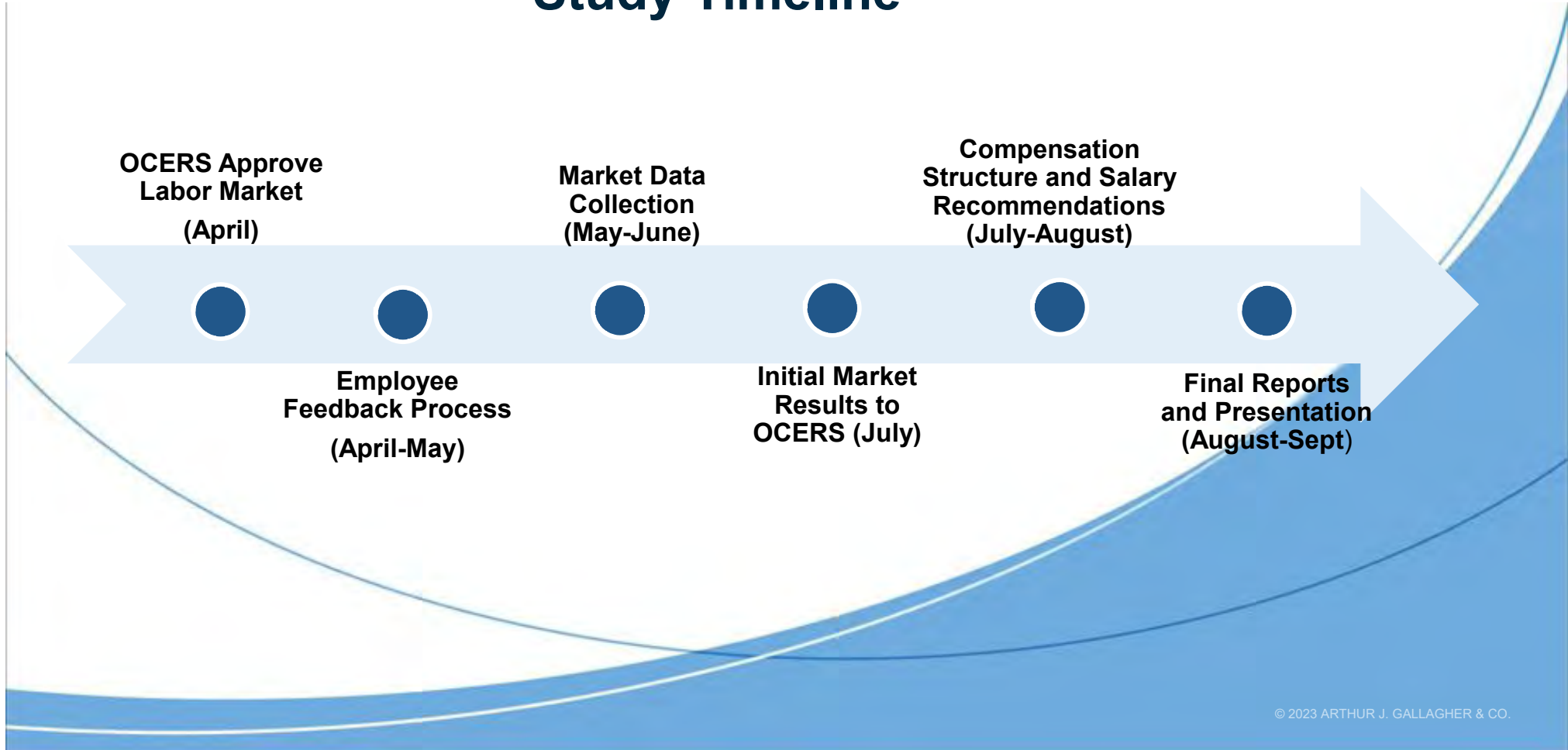
- Employee Review & Feedback Process
- Finalize Job Descriptions
- Classification Study Report

Compensation Study:

- OCERS Approval of Proposed Labor Market
- Gallagher Conduct Market Survey
- OCERS Review of Market Data
- Develop Salary Recommendations/Report



Study Timeline



Questions & Comments

Thank you!

Maggie Williams-Dalgart, Project Manager

Janna Dinkelspiel, Associate Consultant





Memorandum

DATE: April 23, 2024
TO: Members of the Personnel Committee
FROM: Silviu Ardeleanu, Director of Member & Employer Relations Section – Member Services
Suzanne Jenike, Assistant CEO, External Operations
SUBJECT: UPDATE ON OUTREACH REGARDING EMPLOYER DATA

Background/Discussion

This item is to provide an update on the task of obtaining transmittal data from Employers, by working with Employers to identify incomplete data and provide opportunities for training on correcting incorrect data. This is important not only as a Board of Retirement directive, but also to pave the way for an eventual new Pension Administration System (PAS).

On February 13, 2024, the OCERS Member Services team held a Zoom meeting for all Employers. Having laid out what the challenges are, and asking for employers' assistance, OCERS staff then laid out a series of upcoming Zoom meetings to better guide the Employers' technical staff in understanding the member data that is needed.

Additionally, the Employer Payroll team has reached out to each individual Employer to provide documentation of their unique challenges, as well as to provide examples of items that need to be corrected in the short and long term (e.g. Paid Time Off category).

The Employer Payroll Team, along with other staff from the Member & Employer Relations Section will continue the process of meeting with Employers on a quarterly basis, and as needed or required, to obtain the necessary and complete data.

Finally, a Board Policy is being developed by Legal, that will address Employers' requirement to provide accurate, complete, and timely data to OCERS. With an eye on presenting it to the May 23, 2024 meeting of the Governance Committee the policy will provide the requirements, as well as possible consequences if data is not provided as requested. OCERS will continue to work with Employers and provide them support, documentation and/or training that they need.

Submitted by:



SA - Approved

Silviu Ardeleanu
Director of Member and Employer Relations Section
Member Services



SJ - Approved

Suzanne Jenike
Assistant CEO, External Operations



Memorandum

DATE: April 23, 2024
TO: Members of the Personnel Committee
FROM: Suzanne Jenike, Assistant CEO, External Operations
SUBJECT: UPDATE ON REMAINING POSITION - MANAGER

Background/Discussion

The Member Services team is working on developing a case for the addition of a Manager assigned to the Member and Employer Relations section of Member Services. We believe the outreach efforts pertaining to the employer data initiative are critical and require focused attention to be successful.

We will propose the plan to the Personnel Committee Chair and bring it back to the Committee for discussion at the next meeting.

Submitted by:



SJ - Approved

Suzanne Jenike
Assistant CEO, External Operations