

MEMO

MEETING DATE

MAR 30 2011

AGENDA ITEM

#9

Date: March 30, 2011
To: CCCERA Board of Retirement
From: Marilyn Leedom, Chief Executive Officer
Subject: Request for New Position

Recommendation: Create a Second Benefits Coordinator Position

Background:

The Benefits Division combines Member Services (supporting service audit functions, statistical reporting, terminations, employer demographics, certifications and enrollments), and Benefits (which includes retired and active counseling services, retiree payroll, benefit estimates, divorce and disability processing). Currently one Program Coordinator supervises all employees in both these areas. However, workload and job duties have changed since the inception of our pension system.

In the 2008 Administrative budget we described the need for an additional Benefits Coordinator position, both to oversee the more detailed workload of the Member Services section, and as a part of our succession planning. As a part of our internal review for the IRS Letter of Determination application, it became apparent that the addition of this position would be beneficial to CCCERA to improve the audit compliance functions. Although the position was approved with the 2008 budget, we have not included a budgeted salary amount for this position since that time.

Over the last few years, the Board has strongly requested staffing towards succession planning. CCCERA's management team has remained strong, daunted only by the task of increasing age and retirement possibilities, which have only been hastened by changes to benefit levels and possible changes to salaries.

Currently the Benefits Department has one Coordinator, responsible for supervising and monitoring the work of approximately 15 positions, while problem solving and performing much of the hands on work. The Benefits Department can easily be divided in two main areas: Retirement Counselors, both active and retiree, and Member Services. The number of employees in each area is approximately equal.

While our current job description identifies key issues of both positions, the intent is to have more in depth oversight over the member services side of the business, which includes certifications of new hires, termination refunds, employer electronic data monitoring and auditing, tax compliance, and review and cleansing of all data due to audits.