



AGENDA

RETIREMENT BOARD MEETING

SECOND MONTHLY MEETING
October 25, 2017
9:00 a.m.

Retirement Board Conference Room
The Willows Office Park
1355 Willow Way, Suite 221
Concord, California

THE RETIREMENT BOARD MAY DISCUSS AND TAKE ACTION ON THE FOLLOWING:

1. Pledge of Allegiance.
2. Accept comments from the public.
3. Approve minutes from the August 23 and September 13, 2017 meetings.

CLOSED SESSION

4. CONFERENCE WITH LABOR NEGOTIATORS
(Government Code Section 54957.6)

Agency designated representatives:
Gail Strohl, Chief Executive Officer
Christina Dunn, Deputy Chief Executive Officer

Employee Organization: AFSCME, Local 2700
Unrepresented Employees: All CCCERA unrepresented positions

5. The Board will go into Closed Session pursuant to Govt. Code Section 54956.9(d)(1) to confer with legal counsel regarding pending litigation:

Marianne Irvin v. CCCERA, et al., Court of Appeal, Case No.: A149642

OPEN SESSION

6. Presentation of classification and total compensation reports.
7. Consider and take possible action concerning the SACRS legislative proposal to be voted on at the November 2017 SACRS Conference.
8. Consider and take possible action on Board meeting schedule for 2018.

The Retirement Board will provide reasonable accommodations for persons with disabilities planning to attend Board meetings who contact the Retirement Office at least 24 hours before a meeting.

9. Consider authorizing the attendance of Board:
 - a. Trustees' Roundtable, CALAPRS, October 27, 2017, San Jose, CA.
 - b. Legislative Conference, NCPERS, January 28-30, 2018, Washington, DC.

10. Miscellaneous
 - a. Staff Report
 - b. Outside Professionals' Report
 - c. Trustees' comments

The Retirement Board will provide reasonable accommodations for persons with disabilities planning to attend Board meetings who contact the Retirement Office at least 24 hours before a meeting.

Meeting Date
10/25/17
Agenda Item
#3



MINUTES

RETIREMENT BOARD MEETING MINUTES

SECOND MONTHLY MEETING
August 23, 2017
9:00 a.m.

Retirement Board Conference Room
The Willows Office Park
1355 Willow Way, Suite 221
Concord, California

Present: Candace Andersen, Scott Gordon, Jerry Holcombe, Louie Kroll, Jay Kwon, David MacDonald, John Phillips, William Pigeon, Gabe Rodrigues, Todd Smithey, Jerry Telles and Russell Watts

Absent: None

Staff: Gail Strohl, Chief Executive Officer; Christina Dunn, Deputy Chief Executive Officer; Timothy Price, Chief Investment Officer; Karen Levy, General Counsel; Wrally Dutkiewicz, Compliance Officer; Henry Gudino, Accounting Manager; Anne Sommers, Admin/HR Manager; and Colin Bishop, Member Services Manager

Outside Professional Support:
Ed Hoffman

Representing:
Verus Consulting

1. Pledge of Allegiance

Youngman led all in the *Pledge of Allegiance*.

2. Accept comments from the public

No member of the public offered comment.

3. Approval of Minutes

It was M/S/C to approve the minutes of the June 21, 2017 meeting. (Yes: Andersen, Gordon, Holcombe, MacDonald, Phillips, Rodrigues, Smithey, Telles and Watts).

CLOSED SESSION

The Board moved into closed session pursuant to Govt. Code Section 54956.9(d)(1).

The Board moved into open session.

4. There was no reportable action related to Govt. Code Section 54956.9(d)(1).

Kroll was present for subsequent discussion and voting.

5. Review of total portfolio performance for period ending June 30, 2017

Hoffman reviewed the overall market and the market drivers for the second quarter. He also discussed wage growth and unemployment.

Pigeon was present for subsequent discussion and voting.

Hoffman reviewed CCCERA's investment performance for the period ending June 30, 2017 noting the ending market value of the total fund portfolio is \$7,872,495,171. He also reviewed the total fund asset allocation vs. the long term target policy. He reported the total fund gross of fees was 3.2% compared to the policy index of 2.9% for the quarter and total fund gross of fees was 6.9% compared to the policy index of 6.8% year to date. He noted the growth portfolio, the risk diversifying portfolio and the liquidity portfolio have all outperformed. He reviewed the total fund risk analysis for 5 years stating the annualized return was 9.79% with a standard deviation of 4.60%. He noted these numbers were better than expected. He also reviewed the performance of individual funds as well as their fees.

6. Review of portfolio rebalancing report

Price reported this is the first time a rebalancing has been done under the new FFP portfolio construction. He reviewed employer pre-payments, manager withdrawals, manager terminations and where the proceeds were invested. He noted that \$500 million of the proceeds were used to refresh the liquidity program. He reviewed the changes in market values due to the rebalancing and the Phase 2b asset allocation targets as of August 1, 2017 noting the total fund balance is now over \$8 billion dollars. He stated there was a large deployment to short term fixed income which went smoothly.

7. Review of Liquidity Reports from June and July 2017

Price reported the June and July benefit payments were completed without a hitch noting he will not be making a change to the model until there has been a full 12 months of experience.

8. Consider and take possible action to revise Attachment B of the Board of Retirement Resolution 2017-3 to provide Health and Dental Coverage Monthly Premium Subsidy for unrepresented employees effective January 1, 2018

Dunn reported this item will align the health, dental and vision benefits of unrepresented employees with the employees of AFSCME Local 2700 for 2018.

It was **M/S/C** to revise Attachment B of the Board of Retirement Resolution 2017-3 to align unrepresented and represented employees benefits by providing Health and Dental Coverage Monthly Premium Subsidy for unrepresented employees of CCCERA effective January 1, 2018. (Yes: Andersen, Gordon, Holcombe, MacDonald, Phillips, Pigeon, Smithey, Telles and Watts)

9. Presentation of Year to Date 2017 CCCERA budget vs. actual expenditures report

Gudino presented the mid-year budget versus actual expenditures noting the 2017 administrative expenditures are trending annually at \$8.5 million which is 0.10% of the Actuarial Accrued Liability and well under the CERL limit.

10. Miscellaneous

(a) Staff Report –

Strohl reported the November 21, 2017 Board meeting will be offsite at the Pleasant Hill Community Center; Interviews for the Investment Legal Counsel have been held and we are in

the process of evaluating the firms; ICON has begun working on the review of our pension system data; and the food drive supporting the Food Bank of Solano and Contra Costa Counties is ending at the end of September.

She introduced Colin Bishop, the new Member Services Manager.

Price reported on the following investment manager personnel changes noting none of them are critical to CCCERA's portfolio: 1) The Co-CEO of DFA announced he will be retiring at the end of September and the Co-CIO will be stepping into the position; the head of investment management at William Blair has resigned from the firm; the head of distressed debt at Angelo Gordon has left the firm; and a CMBS acquisition member at Torchlight has left the firm.

Dunn reported an email was sent to the Trustees that participate in Social Security notifying them that the referendum vote for Social Security is November 16 and an educational workshop will be held on August 29 from 10-12 in the Board Room. Strohl noted SACRS is also on November 16 and absentee ballots will be available upon request.

Gudino reported invoices have been sent to employers for the 2015 GASB 68 report and the invoices for the 2016 GASB 68 report will be going out soon. Strohl acknowledged Gudino for his presentation on the CAFR at the All Staff Meeting.

(b) Outside Professionals' Report -

Hoffman reported on the upcoming Client Summit that Verus is hosting.

(c) Trustees' comments –

Telles asked if anyone attended the NASRA Conference in August. Strohl stated she attended and that it was good conference. The conference will be in San Diego next year.

Watts reported former Trustee Debora Allen will be speaking at the Contra Costa Taxpayers Association Board of Directors meeting at Denny's on Friday morning from 7:45 to 9:00.

Rodrigues reported he has received several phone calls from law enforcement members regarding the contribution rate increase in July and asked if notifications could be sent out. Strohl stated employers typically send out the notices on rates but will see if there is something CCCERA can do.

Pigeon reported he also had several calls regarding the contribution rate increases and sent a memo explaining the increases to his members.

Andersen stated she will talk to David Twa about departments sending notices to employees regarding contribution rate increases.

It was M/S/C to adjourn the meeting. (Yes: Andersen, Gordon, Holcombe, MacDonald, Phillips, Pigeon, Smithey, Telles and Watts)

Todd Smithey, Chairman

David MacDonald, Secretary



Meeting Date
10/25/17
Agenda Item
#3

MINUTES

RETIREMENT BOARD MEETING MINUTES

REGULAR MEETING
September 13, 2017
9:00 a.m.

Retirement Board Conference Room
The Willows Office Park
1355 Willow Way, Suite 221
Concord, California

Present: Candace Andersen, Jerry Holcombe, Louie Kroll, Jay Kwon, David MacDonald, John Phillips, William Pigeon, Gabe Rodrigues, Todd Smithey, Jerry Telles and Belinda Zhu (Deputy Treasurer, present and voting in Treasurer Russell Watts' absence)

Absent: Scott Gordon

Staff: Gail Strohl, Chief Executive Officer; Christina Dunn, Deputy Chief Executive Officer; Timothy Price, Chief Investment Officer; Karen Levy, General Counsel; Wrally Dutkiewicz, Compliance Officer; Anne Sommers, Administrative/HR Manager; Henry Gudino, Accounting Manager; Tim Hoppe, Retirement Services Manager; and Colin Bishop, Member Services Manager

Outside Professional Support:
John Monroe

Representing:
Segal Consulting

1. Pledge of Allegiance

Levy led all in the *Pledge of Allegiance*.

Telles was present for subsequent discussion and voting.

2. Accept comments from the public

Vince Wells, President of Firefighters Local 1230, asked that the base pay only policy for PEPRA members be revisited by the Board.

3. Approval of Minutes

It was M/S/C to approve the minutes of the July 12, 2017 meeting. (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Smithey, Telles and Zhu)

Rodrigues was present for subsequent discussion and voting.

4. Routine Items

It was M/S/C to approve the routine items of the September 13, 2017 meeting. Holcombe asked about effective retirement dates that are a year old on Item #4. Hoppe stated the dates are retroactive to the effective date on the application once their options are turned in.

Pigeon was present for subsequent discussion and voting.

Holcombe also asked about a death dating back to April. Hoppe stated it sometimes takes the family a while to submit a certified death certificate to CCCERA. Telles asked if proof of life letters have been sent out. Hoppe stated CCCERA is working on the process. (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)

CLOSED SESSION

The Board moved into closed session pursuant to Govt. Code Section 54957.

The Board moved into open session.

5. It was **M/S/C** to accept the Medical Advisor's recommendations and grant the following disability benefits:
 - a. Marilyn Gouvaia – Service Connected (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Rodrigues, Smithey, Telles and Zhu)
 - b. Frank Gomez – Service Connected (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)
 - c. Angela Parga – Non-Service Connected (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Rodrigues and Zhu. No: Smithey and Telles)

6. Consider and take possible action to accept the GASB 68 report from Segal Consulting

Monroe reviewed the results of the GASB 68 report noting the report is solely for employers to use in their financial statements. He stated one of the key items they calculate is the Net Pension Liability (NPL) which is similar to the unfunded actuarial accrued liability but on a market value basis. The total NPL decreased from \$1.51 billion as of December 31, 2015 to \$1.40 billion as of December 31, 2016. He stated this is allocated to each employer based on payroll and reported on each of their balance sheets as a liability.

He reported GASB 82 affects some of the reporting in GASB 68. When an employer subvents a member contribution it is now reported as a member contribution and when a member subvents an employer contribution it is now reported as an employer contribution. Strohl noted this change is only for reporting.

Gudino noted GASB 68 is a service provided for the employers and is not a requirement of the Plan.

It was **M/S/C** to accept the GASB 68 report from Segal Consulting. (Yes: Andersen, Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)

7. Consider and take possible action regarding non-service connected disability retirement allowance of deceased member Paul Crouch

Hoppe reported Paul Crouch was an active member who passed away and had a Death During Active Service Form on file with CCCERA. Based on that election, CCCERA filed a non-service connected disability on his behalf, noting that Mr. Crouch met the medical requirements of permanent disability for a Tier 1 member.

Hoppe noted this would be a non-service connected disability retirement and Mr. Crouch elected an Optional Settlement 2 allowance prior to his death. His spouse will receive a 100% continuance.

It was **M/S/C** to: 1) Find that the member was permanently unable to engage in his job duties and grant a non-service connected disability retirement, effective March 23, 2017; and 2) Grant the member's beneficiary (member's spouse) benefits pursuant to Government Code Section 31762

(Optional Settlement 2 allowance for the life of the named beneficiary). (Yes: Andersen, Gordon, Holcombe, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)

8. Presentation of Semi-Annual Disability Retirement Report

Hoppe reported there were 16 disability retirement applications accepted during the first 6 months of 2017; 11 were service connected and 5 were non-service connected. He reviewed a breakdown of the total number of applications filed by the employers and by County department. He reviewed a breakdown of the type of injury being reported noting musculoskeletal is the most common type.

Andersen was no longer present

He reported 2 disability retirement applications have been accepted since June 30.

9. Consider authorizing the attendance of Board:

- a. It was **M/S/C** to authorize the attendance of 1 Board member at the 2017 Fall Conference, CII, September 13-15, 2017, San Diego, CA. (Yes: Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)
- b. It was **M/S/C** to authorize the attendance of 2 Board members at the Roundtable for Consultants & Institutional Investors, Institutional Investor, October 4-6, 2017, Chicago, IL. (Yes: Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)
- c. It was **M/S/C** to authorize the attendance of 1 Board member at the 2017 Fall Conference, CRCEA, October 23-25, 2017, Emeryville, CA. (Yes: Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)
- d. It was **M/S/C** to authorize the attendance of 8 Board members at the 31st Annual Northern CA Public Retirement Seminar, Public Retirement Journal, October 26, 2017. (Yes: Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)
- e. No action was taken on this item.
- f. No action was taken on this item.

10. Miscellaneous

(a) Staff Report –

Strohl reported our new Employer Handbook has been finalized; and, we are continuing on the second month of the food drive which will run through the end of September.

Price reported the StepStone Group will be presenting a private equity pacing report at the next meeting.

Gudino reported bills have been sent to the employer's for the 2016 GASB 68 fees noting most of the employers have provided payment.

(b) Outside Professionals' Report -

None

(c) Trustees' comments –

Phillips reported on his takeaways from the Verus Client Conference that was also attended by Kroll, Smithey, Watts and Strohl.

Kroll also commented on the Verus Client Conference noting everything went well from check-in to the end of the conference.

MacDonald reported he attended the CALAPRS Principals of Pension Management Course and felt it was a fantastic course. He noted Price presented and did a very good job. He and Smithey attended the Public Funds Forum and felt it was outstanding.

He asked for an update on cybersecurity. Strohl stated she will provide an update.

Telles reported he attended the NCPERS Public Pension Funding Forum and it was a good conference. He stated we should look at negotiating better fees especially when investing in fund of funds.

Pigeon asked that the meeting be adjourned sending thoughts, concerns and support to those suffering from the effects of Hurricane Harvey and Irma.

It was **M/S/C** to adjourn the meeting sending thoughts, concerns and support to those suffering from the effects of Hurricane Harvey and Irma. (Yes: Holcombe, Kwon, MacDonald, Phillips, Pigeon, Smithey, Telles and Zhu)

Todd Smithey, Chairman

David MacDonald, Secretary



Meeting Date
10/25/17
Agenda Item
#6

MEMORANDUM

Date: October 25, 2017
To: CCCERA Board of Retirement
From: Christina Dunn, Deputy Chief Executive Officer
Subject: Presentation of classification and total compensation reports

Background

On April 12, 2017 the Board of Retirement approved the Memorandum of Understanding between CCCERA and United Clerical, Technical & Specialized Employees (AFSCME), Local 2700 for the period of January 1, 2017 through December 31, 2018. Under Section 5.1.C. and 5.1.D of the Memorandum of Understanding provided the following agreement:

5.1 General Wages

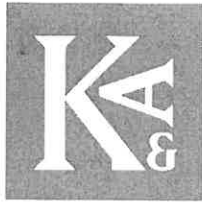
- C. *AFSCME agrees to participate in a classification and compensation study that is to be concluded approximately 2-3 months following ratification. The union may conduct its own classification and compensation study and present it to the Board of retirement prior to meeting and conferring regarding the results of CCCERA's classification and compensation study.*

- D. *Once the study is concluded, the parties will meet and confer within 45 days regarding implementation of the results of that class/comp study. It is understood that the MOU will be reopened for this purpose.*

Next Steps

The attached classification and total compensation reports will be presented by Koff and Associates. CCCERA has been notified that AFSCME intends on presenting a compensation report to the Board following Koff and Associates presentation.

CCCERA and AFSCME will meet and confer regarding the implementation of the results of the reports within 45 days. Therefore, no action is needed at this time.



September 25th, 2017

Classification Study- Represented Classifications Final Report

Contra Costa County Employees' Retirement
Association

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September 25th, 2017

Christina Dunn
Deputy Chief Executive Officer
Contra Costa County Employees' Retirement Association
1355 Willow Way, Suite 221
Concord, CA 94520

Dear Christina,

Koff & Associates is pleased to present the final classification report for the study of represented positions at CCCERA. Volume I documents the classification study process and provides recommendations for the classification plan, allocations of individual positions for all represented CCCERA employees, and class specifications. Volume II, to be sent under separate cover, documents the market compensation survey, findings, and recommendations.

This first volume incorporates a summary of the study's multi-step process, which included results of written Position Description Questionnaires, interviews with employees and management, and employee review and comments in the form of draft class descriptions, and class allocation recommendations.

We would like to thank you for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with you and we look forward to future opportunities to provide you with professional assistance.

Very truly yours,

Katie Kaneko
President



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Appendix I: Recommended Position Allocations

Appendix II: New Classification Descriptions



EXECUTIVE SUMMARY

Background

In June 2017, CCCERA contracted with Koff & Associates (K&A) to conduct a classification and total compensation study for CCCERA's represented classifications. All classification and compensation findings, recommendations, and options for implementations are in Volumes I and II of this report.

This classification review process was precipitated by:

- The concern of the Board of Directors that employees should be recognized for the level and scope of work performed and that they are paid on a fair and competitive basis that allows CCCERA to recruit and retain a high-quality staff;
- To ensure that class descriptions reflect current programs, responsibilities, and technology;
- The desire to have a compensation plan that can meet the needs of CCCERA; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across CCCERA.

The goal of the classification and compensation study is to assist CCCERA in developing a competitive pay and benefit structure, which is based upon market data to ensure that the plan is fiscally responsible, and that meets the needs of the CCCERA with regards to recruitment and retention of qualified staff.

CLASSIFICATION STUDY GOALS

The goals and objectives of the classification portion of the study were to:

- Obtain detailed information regarding each position through a variety of techniques, including written Position Description Questionnaires (PDQs) and interviews with employees and management;
- Prepare an updated classification plan, including recommended class descriptions and position allocations that recognizes the scope and level of the various classes and positions, and is perceived equitable by management and employees alike;
- Provide class descriptions and other documentation that includes information required for compliance with the Americans with Disabilities Act (ADA) and appropriate qualifications, including knowledge, skills, and other requirements that are job-related and meet other legal guidelines; and
- Provide sufficient documentation to allow CCCERA to maintain the classification system on a regular basis.



CLASSIFICATION STUDY PROCESS

The classification study procedures were as follows:

- An initial meeting was held with CCCERA management to clarify study scope, objectives, processes, and deliverables.
- Orientation meetings were held to which all employees were invited, to meet consultant staff involved with the project, clarify study objectives and procedures, answer questions, and distribute the PDQs.
- After the PDQs were completed by employees and reviewed by management and consultant staff, interviews were conducted with all employees and management.
- Following the analysis of the classification information gathered, draft class concepts, specifications, and position allocations were developed for management and employee review.
- After resolution of issues, wherever possible, including additional contacts with employees and management to gain details and clarification, appropriate modifications were made to the draft specifications and allocations and this final report was prepared.

CLASSIFICATION CONCEPTS

Positions vs. Classifications

“Position” and “Classification” are two terms that are often used interchangeably, but have very different meanings. As used in this report:

- A position is an assigned group of duties and responsibilities performed by one person. A position can be full-time, part-time, regular or temporary, filled or vacant. Often the word “job” is used in place of the word “position.”
- A classification or class may contain only one position or may consist of a number of positions. When you have several positions assigned to one class, it means that the same title is appropriate for each position; that the scope, level, duties, and responsibilities of each position assigned to the class are sufficiently similar (but not identical) that the same core knowledge, skills, abilities, and other requirements are appropriate for all positions, and that the same salary range is equitable for all positions in the class.

The description of a position often appears as a working desk manual, going into detail regarding work process steps, while a class description emphasizes the general scope and level of responsibilities, plus the knowledge, skills, abilities, and other requirements for successful performance.



When positions are classified, the focus is on assigned job duties and the job related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are thus evaluated and classified on the basis of such factors as knowledge, skills, and abilities required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), and the impact of the position on the organization and working conditions.

The Relationship Between Classification and Compensation

Classification and the description of the work and the requirements to perform the work are separate and distinct from determining the worth of that work in the labor market and to the organization. While recommending the appropriate compensation for the work of a class depends upon an understanding of what that work is and what it requires (as noted above), compensation levels are often influenced by two factors:

- The external labor market; and
- Internal relationships within the organization.

Compensation findings and recommendations for CCCERA are covered in Volume II of this report.

The Purpose of Having a Classification Plan

A position classification plan provides an appropriate basis for making a variety of human resources decisions such as the:

- Development of job-related recruitment and selection procedures;
- Clear and objective appraisal of employee performance;
- Development of training plans and succession planning;
- Design of an equitable and competitive salary structure;
- Organizational development and the management of change; and
- Provision of an equitable basis for discipline and other employee actions.

In addition to providing this basis for various human resources management and process decisions, a position classification plan can also effectively support systems of administrative and fiscal control. Grouping of positions into an orderly classification system supports planning, budget analysis and preparation, and various other administrative functions.

Within a position classification plan, job classifications can either be broad (containing a number of positions) or narrow (emphasizing individual job characteristics). Broad job classifications are indicated when:

- Employees can be hired with a broad spectrum of knowledge, skill, and/or academic preparation and can readily learn the details of CCCERA, the department, and the position on-the-job; or



- There is a need for flexibility of the assignment within a department or an organization due to changing programs, technologies, or workload.

Individualized job classifications are indicated when:

- There is an immediate need to recruit for specialty knowledge and skills;
- There is a minimum of time or capability for on-the-job training; or
- There is an organizational need to provide for specific job recognition and to highlight the differences between jobs.

Most classification plans are a combination of these two sets of factors and we have chosen the middle ground in this study as being most practicable in CCCERA's changing environment and service delivery expectations, as well as being in line with CCCERA's strategic plan. This approach resulted in recommendations to retitle classifications to more accurately reflect current responsibilities or use more contemporary titles (e.g. Retirement Member Services Technician to Retirement Services Technician), or to reclassify certain individuals into existing or entirely new classifications that more accurately reflect current responsibilities (e.g. Retirement Counselor III to Senior Retirement Counselor). Detailed allocation recommendations are found in Appendix I of the report.

Classification Descriptions

In developing the new and revised classification descriptions for represented positions, the basic concepts outlined in the previous pages were utilized. The recommended class descriptions are included in Appendix II of this report.

As mentioned earlier, the class descriptions are based upon the information from the written PDQs completed by each employee, the individual job audit interviews (if required), and from information provided by employees and managers during the review processes. These descriptions provide:

- A written summary documenting the work performed and/or proposed by the incumbents of these classifications;
- Distinctions among the classes; and
- Documentation of requirements and qualifications to assist in the recruitment and selection process.

Just as there is a difference between a position and a class, there is also a difference between a position description and a class description. A position description, often known as a "desk manual", generally lists each duty an employee performs and may also have information about how to perform that duty. A class description normally reflects several positions and is a summary document that does not list each duty performed by every employee. The class description, which is intended to be broader, more general and informational, is intended to indicate the general scope and level of responsibility and requirements of the class, not detail-specific position responsibilities.



The sections of each class description are as follows:

Title: This should be brief and descriptive of the class and consistent with other titles in the classification plan and the occupational area.

- The title of a classification is normally used for organization, classification, and compensation purposes within CCCERA. Often working titles are used within a department to differentiate an individual. All positions have a similar level of scope and responsibility; however, the working titles may give assurance to a member of the public that they are dealing with an appropriate individual. Working titles should be authorized by Human Resources to ensure consistency within CCCERA and across departmental lines.

Definition: This provides a capsule description of the job and should give an indication of the type of supervision received, the scope and level of the work and any unusual or unique factors. The phrase “performs related work as required” is not meant to unfairly expand the scope of the work performed, but to acknowledge that jobs change and that not all duties are included in the class specification.

Supervision Received and Exercised: This section specifies which class or classes provide supervision to the class being described and the type and level of work direction or supervision provided to this class. The section also specifies what type and level of work direction or supervision the class provides to other classes. This assists the reader in defining where the class “fits” in the organization and alludes to possible career advancement opportunities.

Class Characteristics: This can be considered the “editorial” section of the specification, slightly expanding the Definition, clarifying the most important aspects of the class and distinguishing this class from the next higher-level in a class series or from a similar class in a different occupational series.

Examples of Typical Job Functions: This section provides a list of the major and typical duties, intended to define the scope and level of the class and to support the Qualifications, including Knowledge and Skills. This list is meant to be illustrative only. It should be emphasized that the description is a summary document, and that duties change depending upon program requirements, technology, and organizational needs.

Qualifications: This element of the description has several sections:

- A listing of the job-related knowledge and skills required to successfully perform the work. They must be related to the duties and responsibilities of the work and capable of being validated under the Equal Employment Opportunity Commission’s Uniform Guidelines on Selection Procedures. Knowledge (intellectual comprehension) and Abilities (acquired proficiency) should be sufficiently detailed to provide the basis for selection of qualified employees.



- A listing of educational and experience requirements that outline minimum and alternative ways of gaining the knowledge and abilities required for entrance into the selection process. These elements are used as the basic screening technique for job applicants.
- Licenses and/or certifications identify those specifically required in order to perform the work. These certifications are often required by an agency higher than CCCERA (i.e., the State), and can therefore be appropriately included as requirements.

Physical Demands: This section identifies the basic physical abilities required for performance of the work. These are not presented in great detail (although they are more specifically covered for documentation purposes in the PDQs) but are designed to indicate the type of pre-employment physical examination (lifting requirements and other unusual characteristics are included, such as “finger dexterity needed to access, enter, and retrieve data using a computer keyboard”) and to provide an initial basis for determining reasonable accommodation for ADA purposes.

Working Conditions: These can describe certain outside influences and circumstances under which a job is performed; they give employees or job applicants an idea of certain risks involved in the job and what type of protective gear may be necessary to perform the job. Examples are loud noise levels, cold and/or hot temperatures, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, and other job conditions.

Fair Labor Standards Act

One of the major components of the job analysis and classification review is the determination of each classification’s appropriate Fair Labor Standards Act (FLSA) status, i.e., exempt vs. non-exempt from the FLSA overtime rules and regulations.

As we review position description questionnaires and notes from the interviews, we analyze each classification’s essential functions to determine FLSA status. There are three levels for the determination of the appropriate FLSA status that are utilized and on which we base our recommendations. Below are the steps used for the determination of Exempt FLSA status.

Salary Basis Test: The incumbents in a classification are paid at least \$455 per week (\$23,660 per year), not subject to reduction due to variations in quantity/quality of work performed.

Exemption Applicability: The incumbents in a classification perform any of the following types of jobs:

- Executive: Employee whose primary duty is to manage the business or a recognized department/entity and who customarily directs the work of two or more employees. This also includes individuals who hire, fire, or make recommendations that carry particular weight regarding employment status. Examples: executive, director, owner, manager, supervisor.
- Administrative: Employee whose primary activities are performing office work or non-manual work on matters of significance relating to the management or business



operations of the firm or its customers and which require the exercise of discretion and independent judgment. Examples: coordinator, administrator, analyst, accountant.

- Professional: Employee who primarily performs work requiring advanced knowledge/education and which includes consistent exercise of discretion and independent judgment. The advanced knowledge must be in a field of science or learning acquired in a prolonged course of specialized intellectual instruction. Examples: attorney, physician, statistician, architect, biologist, pharmacist, engineer, teacher.
- Computer professional: Employee who primarily performs work as a computer systems analyst, programmer, software engineer or similarly skilled work in the computer field performing a) application of systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system functional specifications; b) design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specification; or c) design, documentation, testing, creation or modification of computer programs based on and related to user or system design specifications; or a combination of the duties described above, the performance of which requires the same level of skills. Examples: system analyst, database analyst, network architect, software engineer, programmer.

Job Analysis: A thorough job analysis of the job duties must be performed to determine exempt status. An exempt position must pass both the salary basis and duties tests. The job analysis should include:

- Review of the minimum qualifications established for the job;
- Review of prior class descriptions, questionnaires, and related documentation;
- Confirmation of duty accuracy with management; and
- Review and analysis of workflow, organizational relationships, policies, and other available organizational data.

Non-exempt classifications work within detailed and well-defined sets of rules and regulations, policies, procedures, and practices that must be followed when making decisions. Although the knowledge base required to perform the work may be significant, the framework within which incumbents' work is fairly restrictive and finite. (Please note that FLSA does not allow for the consideration of workload and scheduling when it comes to exemption status).

Finally, often times a classification performs both non-exempt and exempt duties, so we analyze time spent on each type of duties. If a classification performs mostly non-exempt duties (i.e. more than 50% of his or her time), then the classification would be considered non-exempt.



CLASSIFICATION FINDINGS AND RECOMMENDATIONS

Classification Structure and Allocation Factors

The proposed classification plan provides CCCERA with a systematic classification structure based on the interrelationship between duties performed, the nature and level of responsibilities, and other work-related requirements of the jobs.

A classification plan is not a stable, unchanging entity. Classification plans may be updated and revised by conducting classification studies that are organizational wide (review of the all classifications and positions) or position-specific. The methodology used for both types of studies is the same, as outlined above.

For either type of study, when identifying appropriate placement of new and/or realigned positions within the classification structure, there are general allocation factors to consider. By analyzing these factors, CCCERA will be able to change and grow the organization while maintaining the classification plan.

1. Type and Level of Knowledge and Skill Required

This factor defines the level of job knowledge and skill, including those attained by formal education, technical training, on-the job experience, and required certification or professional registration. The varying levels are as follows:

A. The entry-level into any occupational field

This entry-level knowledge may be attained by obtaining a high school diploma, completing specific technical course work, or obtaining a four-year or advanced college or university degree. Little to no experience is required.

B. The experienced or journey-level (fully competent-level) in any occupational field

This knowledge and skill level recognizes a class that is expected to perform the day-to-day functions of the work independently, but with guidelines (written or oral) and supervisory assistance available. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee or an assistant when functioning in a lead capacity. Certifications may be required for demonstrating possession of the required knowledge and skills.

C. The advanced level in any occupational field

This knowledge and skill level is applied in situations where an employee is required to perform or deal with virtually any job situation that may be encountered. Guidelines may be limited and creative problem solving may be involved. Supervisory knowledge and skills are considered in a separate factor and should not influence any assessment of this factor.



2. Supervisory/Management Responsibility

This factor defines the staff and/or program management responsibility, including short and long-range planning, budget development and administration, resource allocation, policy and procedure development, and supervision and direction of staff.

A. No ongoing direction of staff

The employee is responsible for the performance of his or her own work and may provide side-by-side instruction to a co-worker.

B. Lead direction of staff or program coordination

The employee plans, assigns, directs, and reviews the work of staff performing similar work to that performed by the employee on a day-to-day basis. Training in work procedures is normally involved. If staff direction is not involved, the employee must have responsibility for independently coordinating one or more programs or projects on a regular basis.

C. Full first-line supervisor

The employee performs the supervisory duties listed above, and, in addition, makes effective recommendation and/or carries out selection, performance evaluation, and disciplinary procedures. If staff supervision is not involved, the employee must have programmatic responsibility, including development and implementing goals, objectives, policies and procedures, and budget development and administration.

D. Manager

The employee is considered management, often supervising through subordinate levels of supervision. In addition to the responsibilities outlined above, responsibilities include allocating staff and budget resources among competing demands and performing significant program and service delivery planning and evaluation. This level normally reports to Executive Management.

E. Executive Management

The employee has total administrative responsibility for CCCERA and reports to the Board of Directors.

3. Supervision Received

A. Direct Supervision

Direct supervision is usually received by entry-level employees and trainees, i.e., employees who are new to the organization and/or position they are filling. Initially under close supervision, incumbents learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience



is gained, assignments become more varied and are performed with greater independence.

B. General Supervision

General supervision is usually received by the experienced and journey-level employees, i.e., employees who have been in a position for a period of time and have had the opportunity to be trained and learn most, if not all, duties and responsibilities of the assigned classification. Incumbents are cross-trained to perform the full range of technical work in all of the areas of assignment.

At the experienced-level, positions exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Incumbents have some flexibility in the selection of steps and timing of work processes.

Journey-level positions receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

C. General Direction

General direction is usually received by senior level or management positions. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

D. Administrative and Policy Direction

Administrative direction is usually received by executive management classifications. The incumbent is accountable for accomplishing CCCERA-wide planning and operational goals and objectives within legal and general policy and regulatory guidelines. The incumbent is responsible for the efficient and economical performance of the organization's operations.

4. Problem Solving

This factor involves analyzing, evaluating, reasoning, and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.



A. Structured problem solving

Employees learn to apply concepts and work procedures and methods in assigned area of responsibility and to resolve problems and issues that are specific, less complex, and/or repetitive. Exceptions or changes in procedures are explained in detail as they arise.

B. Independent, guided problem solving

Work situations require making independent decisions among a variety of alternatives; however, policies, procedures, standards, and regulations and/or management are available to guide the employee towards problem resolution.

C. Application of discriminating choices

Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate concepts, guidelines, references, laws, regulations, policies, and procedures to resolve diverse and complex problems and issues.

D. Creative, evaluative, or critical thinking

The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution.

5. Authority for Making Decisions and Taking Action

This factor describes the degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and supervisory or managerial guidance, and the consequence or impact of such decisions are considered within this factor.

A. Direct, limited work responsibility

The employee is responsible for the successful performance of his or her own work with little latitude for discretion or decision-making. Work is usually supervised while in progress and fits an established structure or pattern. Direct supervision is readily available.

B. Decision-making within guidelines

The employee is responsible for the successful performance of their own work, but able to prioritize and determine methods of work performance within general guidelines. Supervision is available, although the employee is expected to perform independently on a day-to-day basis. Emergency or unusual situations may occur, but are handled within procedures and rules. Impact of decisions is normally limited to the work unit, project, or program to which assigned.



C. Independent action with focus on work achieved

The employee receives assignments in terms of long-term objectives, rather than day-to-day or weekly timeframes. Broad policies and procedures are provided, but the employee has latitude for choosing techniques and deploying staff and material resources. Impact of decisions may have significant program or CCCERA-wide service delivery and/or budgetary impact.

D. Decisions made within general policy or elected official guidance

The employee is subject only to the policy guidance of elected officials and/or broad regulatory or legal constraints. The ultimate authority for achieving the goals and objectives of CCCERA are with this employee.

6. Interaction with Others

This factor includes the nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.

A. Exchange of factual information

The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public. Strained situations may occasionally occur, but the responsibilities are normally not confrontational.

B. Interpretation and explanation of policies and procedures

The employee is required to interpret policies and procedures, apply and explain them, and influence the public or others to abide by them. Problems may need to be defined and clarified and individuals contacted may be upset or unreasonable. Contacts may also be made with individuals at all levels throughout CCCERA.

C. Influencing individuals or groups

The employee is required to interpret laws, policies, and procedures to individuals who may be confrontational or to deal with members of professional, business, community, or other groups or regulatory agencies as a representative of CCCERA.

D. Negotiation with organizations from a position of authority

The employee often deals with the Board of Directors, elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of CCCERA, provide policy direction, and/or negotiate solutions to difficult problems.



7. Working Conditions/Physical Demands

This factor includes specific physical, situational, and other factors that influence the employee's working situation.

A. Normal office or similar setting

The work is performed in a normal office or similar setting during regular office hours (occasional overtime may be required, but compensated for). Responsibilities include meeting standard deadlines, using office and related equipment, lifting materials weighing up to 25 pounds, and communicating with others in a generally non-stressful manner.

B. Varied working conditions with some physical or emotional demands

The work is normally performed indoors, but may have some exposure to noise, heat, weather, or other uncomfortable conditions. Stand-by, call back, or regular overtime may be required. The employee may have to meet frequent deadlines, work extended hours, and maintain attention to detail at a computer or other machinery, deal with difficult people, or regularly perform moderate physical activity.

C. Difficult working conditions and/or physical demands

The work has distinct and regular difficult demands. Shift work (24-7 or rotating) may be required; there may be exposure to hazardous materials or conditions; the employee may be subject to regular emergency callback and extended shifts; and/or the work may require extraordinary physical demands.

Based on the above factors, in the maintenance of the classification plan when an employee is assigned an additional duty or responsibility and requests a change in classification, it is reasonable to ask:

- What additional knowledge and skills are required to perform the duty?
- How does one gain this additional knowledge and skills – through extended training, through a short-term seminar, through on-the-job experience?
- Does this duty or responsibility require new or additional supervisory responsibilities?
- Is there a greater variety of or are there more complex problems that need to be solved as a result of the new duty?
- Does the employee have to make a greater variety of or more difficult decisions as a result of this new duty?
- Are the impacts of decisions greater because of this new duty (effects on staff, budget, CCCERA-wide activities, and/or relations with other agencies)?
- Are guidelines, policies, and/or procedures provided to the employee for the performance of this new duty?
- Is the employee interacting with internal and external stakeholders' others more frequently or for a different purpose as a result of this new assignment?



- Have the working or physical conditions of the job changed as a result of this new assignment?

The analysis of the factors outlined above, as well as the answers to these questions, were used to determine recommended classifications for all CCCERA employees. The factors above will also help to guide the placement of specific positions to the existing classification structure and/or revision of entire classification structure in the future.

Classification Allocation Recommendations

Represented class descriptions were updated in order to ensure that the format is consistent, and that the duties and responsibilities are current and properly reflect the required knowledge, abilities, and skills.

When evaluating the allocation of positions, the focus is on assigned job duties and the job-related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are evaluated and classified on the basis of such factors as knowledge and skill required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), the impact of the position on the organization, and working conditions.

Furthermore, it is necessary to: (i) identify the duties that the incumbents are currently being required to perform; (ii) determine if those duties are captured in the current classification description; and (iii) identify the percentage of duties being performed, if any, which are outside of the current classification.

Title Change

One change in the classification plan, as noted above, was the title change for eight (8) represented classifications.

Table 1. Title Change Recommendations

Current Classification Title	Proposed Classification Title
Retirement Accounting Technician	Accounting Technician
Retirement Accounting Specialist III	Accounting Specialist
Retirement Senior Member Services Data Specialist	Data Technology Specialist
Retirement Member Services Data Specialist	Member Services Specialist
Retirement Office Specialist	Office Specialist
Retirement Counselor Level I	Retirement Counselor



Current Classification Title	Proposed Classification Title
Retirement Member Services Technician	Retirement Services Technician
Retirement Counselor Level II	Senior Retirement Counselor
Retirement Counselor Level III	Senior Retirement Counselor

Title changes are recommended to more clearly reflect the level and scope being performed, to consolidate work into broader categories that could be used CCCERA-wide, as well as establish consistency with the labor market and industry standards. Any compensation recommendations (detailed in Volume II) are not dependent upon a new title, but upon the market value as defined by job scope, level and responsibilities, and the qualifications required for successful job performance. All recommended position allocations in Appendix I.

Reclassification

Reclassification recommendations are made for positions that are working out of class due to level and scope of work and/or job functions that have been added or removed from those positions over time.

The study did not recommend that any positions be reclassified.

Classification Elimination

With the creation of the Senior Retirement Counselor and Retirement Counselor class descriptions there is no longer a need nor enough distinction between classifications to justify the continuance of the Retirement Counselor Levels I-III classifications. Therefore, we are recommending that these classifications be eliminated.

CONCLUSION

The revised classification descriptions serve as a general description of the work performed and provide a framework of the expectations of each position for the employee. Requests for the addition of new positions and classifications and/or reclassification of an existing position should follow established CCCERA policies and procedures. Any decisions related to the addition of new positions and classifications, reclassification of an existing position, and promotion of an existing position will depend on the needs and resources of CCCERA and the availability of work, as well as the ability of existing positions to meet the qualifications of and perform the duties of the higher-level class.

Finally, as mentioned previously, a classification plan is not a static, unchanging entity. The classification plan should be reviewed on a regular, on-going basis and may be amended or revised as required.



Classification Study – Final Report
Contra Costa County Employees' Retirement Association

It has been a pleasure working with CCCERA on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

Respectfully submitted by,
Koff & Associates

A handwritten signature in black ink, appearing to read 'Katie Kaneko'.

Catherine "Katie" Kaneko
President



Appendix I

Recommended Position Allocations

**Contra Costa County Employees' Retirement Association
Allocation List
September 2017**

First Name	Last Name	Current Title	Proposed Title	Action	Supervisor	Title
Gary	Wayne	Retirement Accounting Specialist III	Accounting Specialist	Title Change	Lori Epstein	Accounting Supervisor
Bozena Janet	Kutrowski	Retirement Accounting Specialist III	Accounting Specialist	Title Change	Lori Epstein	Accounting Supervisor
Francisca	Citro	Retirement Accounting Technician	Accounting Technician	Title Change	Lori Epstein	Accounting Supervisor
Glenis	Castelino	Retirement Administrative Assistant	Administrative Assistant	Title Change		Admin/HR Supervisor
Luz	Casas	Retirement Administrative Assistant	Administrative Assistant	Title Change		Admin/HR Supervisor
Gi	Ouang	Retirement Administrative Assistant	Administrative Assistant	Title Change		Admin/HR Supervisor
Justine	Rossini	Retirement Senior Member Services Data Specialist	Data Technology Specialist	Title change	Tresa Skrehot	Member Services Supervisor
Michelle	Reyes	Retirement Senior Member Services Data Specialist	Data Technology Specialist	Title change	Tresa Skrehot	Member Services Supervisor
Mario	Martinez	Retirement Member Services Data Specialist	Member Services Specialist	Title change	Tresa Skrehot	Member Services Supervisor
Kay	Sofios	Retirement Member Services Data Specialist	Member Services Specialist	Title change	Tresa Skrehot	Member Services Supervisor
Sherrina	Cole	Retirement Member Services Data Specialist	Member Services Specialist	Title change	Tresa Skrehot	Member Services Supervisor
Liz	Walker	Retirement Member Services Technician	Retirement Services Technician	Title change	Tresa Skrehot	Member Services Supervisor
Jeff	Patterson	Retirement Member Services Technician	Retirement Services Technician	Title change	Tresa Skrehot	Member Services Supervisor
Jennifer	Love	Retirement Office Specialist	Office Specialist	Title Change		Admin/HR Supervisor
Donnby	Saachao	Retirement Office Specialist	Office Specialist	Title Change		Admin/HR Supervisor
Kelli	Ingersoll	Retirement Office Specialist	Office Specialist	Title Change		Admin/HR Supervisor
Ruchelle	Durbin	Retirement Office Specialist	Office Specialist	Title Change		Admin/HR Supervisor
Rhonda	Jones	Retirement Office Specialist	Office Specialist	Title Change		Admin/HR Supervisor
Jessica	Irby	Retirement Counselor Level III	Senior Retirement Counselor	Title change	Jerrie Davis	Retirement Services Supervisor
Leticia	Martin	Retirement Counselor Level II	Senior Retirement Counselor	Title change	Jerrie Davis	Retirement Services Supervisor
Brittany	Revueiba-Ozuna	Retirement Member Services Technician	Retirement Services Technician	Title change	Jerrie Davis	Retirement Services Supervisor
Karla	Demarty-Ooghe	Retirement Member Services Technician	Retirement Services Technician	Title change	Jerrie Davis	Retirement Services Supervisor
Dhana	Morant	Retirement Counselor I	Retirement Counselor	Title change	Jerrie Davis	Retirement Services Supervisor
Brianne	Wilkins	Retirement Counselor Level III	Senior Retirement Counselor	Title change	Jerrie Davis	Retirement Services Supervisor
James	Lambart	Retirement Counselor Level III	Senior Retirement Counselor	Title change	Jerrie Davis	Retirement Services Supervisor
Elise	Diliberto	Retirement Counselor I	Retirement Counselor	Title Change	Jerrie Davis	Retirement Services Supervisor



Appendix II

New Classification Descriptions



JUNE 2017
FLSA: NON-EXEMPT

ACCOUNTING SPECIALIST

DEFINITION

Under general direction, performs a variety of specialized technical accounting functions in support of CCCERA's financial operations; areas of responsibility may include reconciliation of investment accounts, ledgers and cash accounts, maintenance of retirement system databases, auditing of transactions, rates, and records, and assisting with the preparation of various governmental agency financial and statistical reports; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Accounting Supervisor.

CLASS CHARACTERISTICS

This is the advanced level in the paraprofessional accounting series responsible for regularly performing the most complex duties related to auditing, reconciliation, and account support activities. This position may also provide lead direction to accounting staff. This class is distinguished from the Accountant classification in that the latter is a professional level requiring completion of a four-year degree and knowledge of a wide variety of governing financial standards and their impact on financial statements.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Records transactions, and maintains and reconciles a variety of general ledger accounts, cash accounts, and related subsidiary accounts pertaining to retirement account investment activity and transactions.
- Records, reviews, reconciles, and processes varied accounting reports, journals, ledgers, payroll, retirement contributions, or related fiscal data; reports discrepancies to appropriate parties.
- Receives and reviews correspondence from investment managers; maintains, prepares, and records investments from custodial banks for multiple investment manager's balance sheets and income statements; analyzes and records investments into appropriate stock and bond income category; researches, analyzes, and resolves discrepancies.
- Performs cash reconciliations for a variety of accounts including, but not limited to, Payroll Accounts, Operating Accounts, Operation Cash Accounts, and real properties owned by CCCERA which are managed through a third party; performs a three-way reconciliation between (i) the bank's operating statement; (ii) CCCERA's general ledger; and (iii) Contra Costa County's Auditor's general ledger system; researches, analyzes, and resolves discrepancies; prepares journal entries.
- Processes membership related fiscal transaction reports from member agencies; reviews and audits a variety of fiscal factors including, but not limited to, contribution rates, contributions, and service credits, ensuring compliance with mandated and CCCERA rules and regulations; reconciles and balances monthly reports to cash received; researches, resolves and reconciles discrepancies; generates deposit permit documents and journal vouchers; posts adjustments to CCCERA's accounting system.

- Performs reconciliations on County payroll and contracts; extracts payroll related data from the County's general ledger; reconciles County (i) retirement revenues and expense accounts to cash received; (ii) retirement reports to the County Auditor's reconciliation; and (iii) County purchase contracts; prepares worksheets to record and document totals for payroll and purchases; posts to CCCERA's general ledger; prepares journal vouchers for the County and other member agencies.
- Processes member refunds; audits and reviews terminated employee's file; identifies any missing information; verifies account balances and payments are accurate; approves refund and posts transaction to CCCERA's accounting system; ensures all transactions are compliant with mandated and CCCERA's rules and regulations.
- Conducts a final review of accounts payable transactions in the system; reviews transactions for completeness and accuracy; validates accounting codes and other transaction details, and verifies supporting documentation.
- Prepares and completes a variety of financial forms and/or reports relevant to assigned fiscal program operations.
- Creates and maintains various financial databases, file systems, correspondence, and ledger records to track information related to account balances.
- Communicates with auditors, investment managers, master custodian bank, and other financial staff with various organizations.
- Provides support to the annual audit process by preparing documents, and researching, verifying, and resolving issues which arise during the audit.
- When assigned by supervisor, may provide training on work procedures to staff.
- Proofreads and checks financial transactions for accuracy, completeness, and compliance with Retirement Board policies, accounting standards, and government regulations.
- Performs related duties as assigned.

When assigned to Active Member Database:

- Reconciles Active Member reserves with Active Member database, ensuring that accurate accounting is reflected in both systems.
- Extracts data from the Active Member database and performs a comparative analysis of the monetary transactions between the Accounting System and the system database; researches discrepancies by referencing source documents; refers reconciling items back to initiator for correction.
- Creates a detailed reconciliation for each Primary Account within each Tier by separately recording the General Ledger Active Reserve Accounts and the Active Member Database and by ensuring reconciled items are detailed to reflect member information, transaction type, the amount of the discrepancy and the research documentation.
- Communicates with other divisions and their staff in the areas of membership accounting policies, procedures, reconciling items, findings, and database issues.

QUALIFICATIONS

Knowledge of:

- Accepted principles, practices, purpose, and operations of an Employees' Retirement System. Policies, procedures, and regulations of the County Employee's Retirement Act of 1937 as it relates to work performed.
- Methods and techniques of reconciling multiple complex accounting transactions.
- Methods and techniques of researching and analyzing a variety of fiscal transactions involving general accounting, retirement membership data, and investments.
- Methods and techniques of calculating and processing fiscal transactions in multiple organizations.
- General knowledge of international and domestic investments.

- Methods and techniques of developing and maintaining complex filing records.
- Advanced mathematical skills.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.

Ability to:

- Reconcile and balance a variety of financial transactions from multiple accounting systems.
- Interpret and apply provisions of retirement laws with respect to financial transactions.
- Learn the financial reporting format from member agencies with respect to membership data and transactions.
- Perform accurate and legible financial and statistical work.
- Make rapid and accurate arithmetical computations.
- Research and compile data relative to payrolls, retirement benefit statements, investment records, reports, and actuarial reports.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Organize own work, set priorities, and meet critical deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of twelfth (12th) grade supplemented by six units of college level accounting coursework and at least three (3) years of increasing responsible experience in performing complex account posting and reconciliation, retirement payroll account monitoring, financial record database management, or investment account recordkeeping and reconciliation.

Licenses and Certifications:

- None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend,

stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

ACCOUNTING TECHNICIAN

DEFINITION

Under general supervision, incumbents perform a variety of accounting office functions in support of CCCERA's fiscal transactional operations; functional areas of responsibility include reviewing and processing accounts payable, processing invoices, preparing journal entries for the Auditor's Office, and processing payroll related transactions; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Accounting Supervisor. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This classification is responsible for independently processing financial records and transactions within CCCERA's Finance Department and is distinguished from the Accounting Specialist classification in that the latter is responsible for the more complex and higher-level technical accounting work, has a higher level of discretion and independent decision-making, and provides technical and functional direction to lower-level finance support staff.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs a variety of technical accounting duties in support of CCCERA's fiscal transactional operations.
- Processes account payables to ensure that all charges are in compliance with policies and procedures; compares invoices, supporting documentation, and signatures to confirm paperwork is accurate; resolves invoice discrepancies.
- Processes invoices for periodic check runs; runs reports within the financial management system and compares to transaction worksheets to confirm they match and are accurate; submits to higher level accounting staff for review prior to final processing.
- Processes refunds from the Member Services Department; sets up member information within the financial management system; enters and codes all accounts for payment processing.
- Reviews and checks payroll deductions from the Retiree Payroll for accuracy prior to formatting, printing, and preparing the monthly Retiree Payroll check run; codes all payroll deductions for correct payer source; generates Payroll Deduction Report and prints backup documentation and mailing labels.
- Maintains the petty cash fund; handles disbursements and balancing of the fund; reconciles and replenishes the fund.
- Prepares Journal Vouchers for the Auditor's Office, including cash transfers and accounts payable transactional reporting.
- Performs duties in support of the purchasing function; sets up and maintains database for new vendors; reviews quotes for services to identify and resolve discrepancies; verifies changes with management; communicates with vendors regarding statements and invoices; creates purchase orders; scans and files all supporting documentation.

- Checks, indexes, and files bills, vouchers, purchase orders, claims, and other financial papers.
- Creates, maintains, and records financial transactions and data on accounting software, spreadsheets, and databases; monitors expenditure codes and, within established guidelines, adjusts as needed.
- Performs arithmetic calculations and verifies totals and extensions.
- Supports record retention, record keeping, and maintenance of inventory of CCCERA's fixed assets.
- Assists in a variety of general office support work such as organizing and maintaining various files, preparing reports, forms, and specialized documents.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Operations, services, and activities of an accounting department.
- General understanding of accounting policies and procedures relevant to work performed.
- Operational characteristics of financial management software relevant to work performed.
- Basic mathematical skills.
- Methods and techniques of reviewing and comparing fiscal documents for alignment.
- Principles and practices of payroll processing.
- Clerical procedures and practices, including filing, indexing, and cross-referencing.
- Principles and practices of customer service.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- English usage, grammar, spelling, vocabulary, and punctuation.

Ability to:

- Learn operations and services of a public retirement system.
- Perform a variety of fiscal transaction processing tasks.
- Generate routing reports within a financial management system.
- Make rapid and accurate arithmetical computations.
- Create and maintain fiscal records and files.
- Operate modern office equipment, including computers and specialized software applications relevant to work performed.
- Organize own work, set priorities, and meet critical deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Follow oral and written directions.
- Maintain confidentiality.
- Effectively communicate orally and in writing.
- Communicate information in a format that is easily understood.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of twelfth (12th) grade and two (2) years of increasingly responsible experience in financial/accounting support and recordkeeping.

Licenses and Certifications:

➤ None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

ADMINISTRATIVE ASSISTANT

DEFINITION

Under general supervision, performs a variety of complex and specialized confidential and non-confidential secretarial and administrative support functions for the Board of Retirement and executive/management staff; oversees and supports specialized functional areas such as CCCERA's Imaging System; coordinates administrative functions such as records retention and procurement; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Administrative/Human Resources Supervisor. May exercise lead supervision over lower level technical or clerical staff.

CLASS CHARACTERISTICS

This classification provides a wide variety of technical, secretarial, and administrative support of a responsible nature under limited supervision in support of the Board of Retirement and executive/management staff. Work is often of a confidential nature and requires a detailed understanding of various department policies, procedures, and regulations in order to interpret and apply them to a variety of situations. This position is distinguished from Office Specialist by the variety and complexity of assignments.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs a variety of complex secretarial and administrative support functions for the Board of Retirement and executive/management staff, including business correspondence, meeting scheduling and calendaring, and coordinating travel arrangements; creates and maintains a variety of Board member personnel and continuing education files, as well as legal, investment, and administration files; updates and maintains the office library.
- Composes a variety of documents such as correspondence, memoranda, reports, forms, legal documents, spreadsheets, or charts from instructions or drafts, based on knowledge and understanding of departmental activities.
- Compiles, verifies, codes, and processes bills; resolves billing issues with vendors and other organizations.
- Proofreads printed material for grammar, punctuation, spelling, and overall content accuracy, ensuring compliance with CCCERA's policies with respect to format and presentation.
- Prepares the Retirement Board meeting routine agenda items for inclusion in the Board packet; verifies accuracy of data within some packet documentation; copies and collates materials for Board and committee meetings; arranges for the distribution of Board and committee meeting packets.
- Prepares Board and committee meeting notices ensuring compliance with the provisions of the Brown Act; sets up audio equipment for recording Board meeting discussions and votes; attends meetings,

- takes and transcribes meeting minutes; and maintains meeting minutes binders and documents; resolves audio problems and uploads audio recordings for inclusion on CCCERA's website.
- Prepares and assists in the preparation of reports, recommendations, and other written material by researching information, compiling and organizing content, and by performing or coordinating the clerical work essential in their preparation.
 - Receives and reviews requests for travel; makes travel arrangements consistent with CCCERA's policies and procedures; checks multiple travel options to ensure lowest cost possible; creates and processes travel authorization forms; prepares and distributes travel itineraries; updates travel logs; prepares and processes travel expense and mileage reimbursements, and credit card charges.
 - Schedules training, registers employees, and maintains files for a variety of training programs, conferences, and seminars.
 - Provides support to CCCERA's payroll and Human Resources functions; creates calendars and reminders for supervisors and managers on payroll cutoff dates; collects employee time cards and reviews for general accuracy; researches discrepancies and elicits guidance from supervisors and managers; prepares reports to ensure accuracy of information entered into the system; calculates, adjusts, and balances leave taken/accruals within established guidelines; researches and responds to questions from employees on payroll related matters; prepares employee appraisal reports and Personnel Action Notices.
 - When assigned to Imaging/Records Retention: oversees the overall operations and maintenance of CCCERA's Imaging System; coordinates the schedule for the release of imaged documents; serves as final review and maintains quality control for all imaged documents; coordinates, maintains, and preserves CCCERA's records retention system; coordinates the storage, retrieval, preservation, disposition, and destruction of records in accordance with mandated and CCCERA policies, procedures, and standards; maintains inventory log of materials archived.
 - Coordinates purchasing activities, including assessing needs, ordering supplies, and reviewing supply requests for accuracy; organizes and maintains supplies; resolves billing issues with vendors; researches new vendors to fit organizational needs.
 - Performs a variety of routine maintenance, training, and troubleshooting for various office machines; contacts repair person in accordance with service contracts when necessary.
 - Opens, screens, and distributes mail.
 - Maintains confidential files and records within assigned functional area of responsibility.
 - Assists the public and employees in obtaining information from official records.
 - Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of office administration and secretarial support.
- Principles of lead supervision and training.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- Rules and regulations governing public meeting notices, meeting recording/minute taking, and distribution of meeting materials, including the provisions of the Brown Act.
- Principles and practices of record retention and management, including imaging system processes and CCCERA's policies and procedures.
- Principles and practices of payroll processing, including compliance with memoranda of understanding, personnel policies, and related employment documents.
- Sources for researching options and making travel arrangements for multiple groups.
- Principles and practices of public sector procurement.
- Principles and practices of customer service.

- Methods and techniques of developing and maintaining complex filing records.
- English usage, grammar, spelling, vocabulary, and punctuation.

Ability to:

- Prepare a variety of written correspondence, documents, meeting notices, meeting minutes, and related materials, ensuring consistency in format.
- Lead, plan, assign, and review the work of assigned staff.
- Organize own work, set priorities, and meet critical deadlines.
- Independently follow directions and complete assigned tasks.
- Operate modern office equipment, including computer equipment and specialized software application programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from twelfth (12th) grade and three (3) years of increasingly responsible clerical and/or secretarial experience.

Licenses and Certifications:

- None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees should possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

DATA TECHNOLOGY SPECIALIST

DEFINITION

Under direction, performs a variety of complex systems and data audit tasks within CCCERA's Plan Administration System (CPAS) Member Sub-Ledger Database System; receives, reviews, audits, and posts all incoming data submitted by member agencies or entered into the system by CCCERA staff authorized to do so; reconciles a variety of demographic and financial transaction data within the systems; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Member Services Supervisor. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This class is distinguished from the Member Services Specialist and the Retirement Counselor/Senior Retirement Counselor classes by the performance of the full range of systems technical duties which include responsibility for the timely completion and transfer of data, and quality control with respect to the integrity of the data to be used by CCCERA and its member agencies.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Receives files from member agencies for import into CPAS; adjusts raw data files to ensure proper format; generates "scrub sheets" to audit member submissions relative to data in the CPAS system; troubleshoots files to identify and resolve data errors; interfaces with staff in member agencies to verify and correct electronic data files; uploads member files to CPAS.
- Identifies factors contributing to recurring data errors; participates in researching errors to enhance and improve data flow, and to test and implement solutions which result in improved data accuracy.
- Audits posted member accounts to ensure accuracy by reviewing and reconciling multiple data points between member files and CPAS including, but not limited to, member demographics, earnings and wages, salary and deduction totals, contribution rates, and related transactions; balances imported files to "scrub sheets" and adjusts data as needed; submits files to the Accounting Department.
- Performs system monetary validation and transfers; verifies monies received for purchases against calculated costs, and posts the receivable amount to CPAS; transfers retiree contributions to retiree reserve accounts; validates interest postings to employee accounts against the Member Sub-Ledger Database System; transfers funds from purchase contracts and reciprocity transactions; prepares journal entries for the Accounting Department.
- Maintains the Member Sub-Ledger Database System ensuring that all information in the system is verified and entered in an accurate manner; researches and verifies information including, but not limited to, service credit discrepancies, contribution status, monetary corrections, and account adjustments.

- Collaborates with information technology staff on system changes, maintenance and upgrades, and the resolution of system errors; participates in project meetings; undertakes system testing within the Member Services Department.
- Audits, updates, and generates data for use in the preparation of CCCERA fiscal and operational statements, forms, and reports.
- Performs data entry for a variety of tasks related to member account maintenance.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Methods and techniques of importing and converting files to required format.
- Methods and techniques of auditing and reconciling system files and accounts.
- Operational characteristics of pension system databases.
- Principles and practices of database maintenance and testing.
- Intermediate to advanced level knowledge of Excel spreadsheet applications.
- Methods and techniques of troubleshooting data files, including query reports.
- Methods and techniques of data entry and retrieval.
- Accepted principles, practices, purpose, and operations of an Employees' Retirement System.
- Principles and practices of effective customer service.
- Principles and practices of maintaining confidential member records.
- Mathematical techniques.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- English usage, grammar, spelling, vocabulary, and punctuation.

Ability to:

- Perform a variety of database functions.
- Identify, troubleshoot, and correct data errors.
- Review, audit, and validate or correct system data.
- Perform accurate mathematical calculations.
- Organize own work, set priorities and meet critical deadlines.
- Learn and apply the applicable rules, regulations, policies, and procedures of the County Employees' Retirement Act of 1937 relevant to work performed.
- Maintain confidentiality.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12th) grade supplemented by coursework in accounting and two (2) years of experience as a Member Services Specialist; or three (3) years of increasingly responsible accounting support and/or fiscal database maintenance experience in a public or corporate retirement system comparable to CCCERA.

Licenses and Certifications:

➤ None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with use of proper equipment.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

MEMBER SERVICES SPECIALIST

DEFINITION

Under direction, provides specialized support to the Member Services Department; processes all member terminations by researching separation documents and providing information and educational materials to terminated members; generates refund calculation spreadsheets and processes refund transactions; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from supervisory and management staff.

CLASS CHARACTERISTICS

This class is distinguished from the Data Technology Specialist in that the latter class performs the full range of systems technical duties which include responsibility for the timely completion and transfer of data, and quality control with respect to the integrity of the data to be used by CCCERA and its member agencies.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Responds to a variety of telephone calls and email inquiries from working members seeking information on their membership; explains member rights and responsibilities regarding retirement plan benefits and options; within guidelines, provides guidance once members have terminated employment; refers members to counseling staff as appropriate.
- Obtains relevant information on membership status through researching CCCERA's database, available personnel, or termination membership records, microfiche records, system reports, and other sources to obtain the necessary information for tasks related to resolving retirement service credit discrepancies, status of contributions, and vesting requirements.
- Processes all member terminations ensuring tact and privacy in communications; researches separation documents; reaches out to members, as needed, to obtain additional information; generates correspondence to provide members with account information, educational materials, and instruction packets to assist them in making informed choices.
- Generates refund calculation spreadsheets to compute a final refund amount; balances employee contribution accounts to ensure all monies are accurate; validates correct interest posting and tax requirements; completes check requests and related documents to facilitate refunds and submits to the Accounting Department.
- Performs or verifies required calculations for retirement payroll, retirement service credit audits, account balances, service credit purchase costs, and related transactions; prepares final average salary benefit options for deferred and reciprocal members.
- Performs calculations for member account adjustments, including applying interest to missed payments.

- Researches distribution options available to members who are in the “over 70 deferred” category; places information into system reports.
- Provides assistance in the preparation of monthly, quarterly, and annual reports by generating system documents and verifying information on spreadsheets.
- Completes deposit permits for the deposit of all monies collected from members for service purchases; enters all relevant information into the purchase tracking log; delivers all checks and cash, with supporting documentation, to the Accounting Department.
- Performs general office duties including filing, photocopying, maintaining records and compiling data for forms and reports.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Accepted principles, practices, purpose, and operations of an Employees' Retirement System.
- Principles and practices of benefits administration in the public sector.
- Principles and practices of effective customer service.
- Principles and practices of maintaining confidential member records.
- Mathematical techniques.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- English usage, grammar, spelling, vocabulary, and punctuation.

Ability to:

- Respond to questions, and provide relevant information to members who have terminated from the system.
- Perform a variety of retirement plan related calculations.
- Organize own work, set priorities and meet critical deadlines.
- Learn and apply the applicable rules, regulations, policies, and procedures of the County Employees' Retirement Act of 1937 relevant to work performed.
- Maintain confidentiality.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Demonstrate strong customer service skills.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12th) grade and two (2) years of experience as a Retirement Services Technician; or three (3) years of increasingly responsible clerical accounting experience in a public or corporate retirement system comparable to CCCERA.

Licenses and Certifications:

➤ None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.



JUNE 2017
FLSA: NON-EXEMPT

OFFICE SPECIALIST

DEFINITION

Under general supervision, performs a spectrum of office support activities; gathers, completes, and processes forms, documents, memos, and letters; review forms, documents, and letters for completeness and accuracy; answers phones, and greets and directs visitors; prepares and scans files for CCCERA Imaging and Record Retention Programs; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Administrative/Human Resources Supervisor. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This class is distinguished from the Administrative Assistant by its responsibility for processing a wide variety of letters, forms, memos, and imaging in support of CCCERA's administrative and operational functions. This classification is further distinguished from the Administrative Assistant in that the latter classification performs more varied and complex work assignments, such as providing administrative and secretarial support to the Retirement Board and executive and management staff, and overseeing functional programs including the Imaging and the Records Retention Programs.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs a variety of telephone/receptionist functions; activates/reactivates phones; answers, screens, announces, and transfers calls to appropriate staff members; answers basic information and procedural questions; greets and directs authorized visitors.
- Prepares complex correspondence and forms, including member estimates, options, or other form letters, derived from system calculations or brief instructions.
- Prepares and assembles reports, forms, packets, and specialized documents related to CCCERA's operations, including monthly leave accrual reports, Retirement Allowance Program forms, and application packets.
- Maintains and updates a variety of logs to track transactions such as applications, distribution election, accounting checks, undelivered benefits statements, new hires, and related categories.
- Reviews forms, applications, documents, and letters for accuracy and completeness; reviews member files to identify retirement tier and status in the system; organizes information and places into files for Counselor staff.
- Assembles and processes a wide variety of outgoing mail and mass mailings, including forms, handbooks, warrants, checks, and Service Retirement and Disability Retirement application packets.
- Assembles and lists all medical documents acquired from member, Risk Management, and attorneys creating a complete package for Medical Advisor review.
- Provides assistance to management in the processing of Public Records Act requests.

- Ensures that meeting and counseling rooms and other staff facilities are maintained, and that any needed forms, booklets, and general office supplies are stocked.
- When assigned to Imaging/Records Retention: operates and maintains the CCCERA Imaging System; collects, scans, and indexes documents; creates spreadsheets to track pages; prepares, cleans, and purges files; categorizes all imaged documents and correspondence for easy access by CCCERA employees; checks imaged documents for quality; retrieves, prepares, and sends imaged files to off-site storage; ensures adherence to CCCERA policies, procedures, and quality control measures; maintains detailed records, logs, files, and libraries.
- Performs routine maintenance, training, and troubleshooting for various office machines; contacts repair person as needed; makes arrangements for equipment maintenance and repair.
- Attends to a variety of office administrative details, such as keeping informed of departmental activities, transmitting information, copying documents and materials, and ordering and stocking office supplies.
- As assigned by management, may lead and direct the work of assigned staff and conduct training in work procedures.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of office administration.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- Principles and practices of data collection and report preparation.
- Recordkeeping procedures and practices, including filing, indexing, and cross-referencing methods.
- Methods and techniques of imaging documents for accuracy and completeness.
- Principles and practices related to document retention.
- Basic mathematics.
- Principles and practices of customer service.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.

Ability to:

- Process a variety of forms and letters in support of CCCERA's operations.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Prepare correspondence and reports; maintain records and databases.
- Prepare and maintain accurate and concise records and filing systems.
- Understand and carry out oral and written instructions
- Organize own work, set priorities and meet critical deadlines.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Maintain confidentiality.
- Perform word processing with sufficient speed and accuracy to perform assigned work.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to completion of the twelfth (12th) grade and two (2) years of clerical and/or secretarial experience.

Licenses and Certifications:

➤ None

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.



JUNE 2017
FLSA: NON-EXEMPT

RETIREMENT COUNSELOR / SENIOR RETIREMENT COUNSELOR

DEFINITION

Under direction, performs a variety of specialized technical counseling duties in support of CCCERA's retirement system; responsibilities include working in the areas of direct counseling to active members under consideration for regular retirement; provides counseling and fact-finding to retirees concerned with their annuity and/or benefits; performs specialized retiree payroll and recordkeeping duties; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Retirement Services Supervisor. Exercises no supervision over staff.

CLASS CHARACTERISTICS

Retirement Counselor: This is the entry level classification in the flexibly staffed Counselor series. Initially under general supervision, incumbents perform a variety of counselling and payroll processing duties while learning CCCERA policies and procedures. As experience is gained, assignments become more varied, complex, and difficult, and close supervision and frequent review of work lessen as an incumbent demonstrates skill to perform the work independently. Positions at this level usually perform most of the duties required of the positions at the Senior Counselor level, but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods until fully competent and successfully functioning at this level. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

Senior Retirement Counselor: This is the fully competent level classification in the series. Positions at this level are distinguished from the Retirement Counselor level by the performance of the full range of duties as assigned, working independently with minimal oversight and supervision, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Successful performance of the work requires thorough knowledge of CCCERA's retirement program offerings and the rules and policies it operates under, and its payroll transaction processes, and requires a high level of facilitation, conflict resolution, and interpersonal communication skills to effectively address the more difficult situations. This level may audit and review the work of staff at the same level or lower and provide guidance and training to Retirement Counselors and Retirement Services Technicians. This class is distinguished from the Retirement Services Supervisor in that the latter is responsible for supervising the staff, activities, and operations within the Retirement Services Department.

The Retirement Counselor/Senior Retirement Counselor is a flexibly staffed series, and positions at the Senior level are normally filled by advancement from the Retirement Counselor level, requiring one (1) year of experience in the Retirement Counselor class, and after gaining the knowledge, skill, and experience which meet the qualifications for the work, and after demonstrating the ability to perform the work of the higher-level class.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job. Depending upon assignment, duties may include but are not limited to:

When assigned to Counseling:

- Responds orally or in writing to a wide variety of retirement benefit questions for prospective, active, deferred, and retired members, clearly articulating their various options so members can make informed retirement planning choices.
- Counsels members and their beneficiaries on benefit options, service purchases, service retirement benefits, death benefits, and deferred and reciprocal benefits in compliance with mandated rules and regulations; assists members in completing member enrollment forms and other related forms including, but not limited to, change of beneficiary designation, electronic funds transfer, and withholding certificates for pension payments; and processes member applications.
- Calculates retirement benefit estimates verifying multiple factors, including service credits, purchase contracts, retirement tier (s) and reciprocity arrangements with other agencies; sources utilized include, among others, administrative guidelines, union agreements, mandated regulations, employment and payroll records, and County Employees' Retirement Act of 1937; requests information from staff in CCCERA, member agencies, and other retirement agencies to ensure factual and accurate data with which to perform calculations.
- Calculates and processes service purchases by verifying member employment and payroll history; confirms and certifies service purchases for payroll processing.
- Conducts monthly group counseling sessions for active members who are seeking information on retirement options; in advance of session, calculates estimated retirement pension benefits for each group participant to educate and inform them on benefit options.
- Researches, evaluates, and resolves complex retirement benefit claims and inquiries for specific issues such as divorce and community property situations; identifies and reviews required documentation; calculates account splits and informs alternate payee options; prepares forms and correspondence, and processes paperwork
- Performs system data entry to update member records and information based upon research conducted for calculating benefits, service purchases and related transactions.
- Performs general office duties such as filing, maintaining records, and compiling data for reports
- Performs related duties as assigned.

When Assigned to Retiree Payroll:

- Processes and distributes a large and complex retirement payroll, meeting all mandated retirement rules and regulations.
- Reviews and reconciles group deductions, ensuring they match prior to submitting the payroll to the Accounting Department; works with member agencies and internal CCCERA staff, including the information technology staff, to correct errors.
- Receives updated information from retirees and places data into the payroll system, ensuring all data is entered in an accurate manner; makes changes/adjustments for tax deductions, bank routing information, child and spousal support wage garnishments, tax levies, and related financial transactions.
- Receives notification of retiree death from family members, attorneys, Social Security reports, and related sources; reviews estate related documents; confirms beneficiaries and determines paperwork necessary to process survivor benefits; coordinates completion of necessary documentation with appropriate party; processes benefits once all documentation is received.
- Conducts process tests and examines financial transactions for accuracy; submits to team member or supervisor for review.

- Collaborates with information technology staff on testing new software under development to progress project from testing environment to the actual environment.
- Provides assistance to supervisor on assigned special projects.
- Audits domestic relation orders; calculates death benefits; researches a variety of issues including returned mail, stale dated checks, wage garnishments and levies.
- Performs general office duties such as filing, maintaining records, and compiling data for reports.
- As assigned, train new staff in work procedures.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

Retirement Counselor

- Operations and services of a comprehensive retirement system, including member counseling and payroll transaction processing.
- Accepted principles, practices, purpose, and operations of an Employees' Retirement System.
- Principles and practices of benefits administration in the public sector.
- Principles and practices of payroll processing.
- Principles and practices of effective counseling and meeting facilitation.
- Principles and practices of effective customer service.
- Principles and practices of maintaining complex and confidential member files and methods.
- Mathematical techniques.
- Modern office practices and methods including computer equipment and specialized applications relevant to the work performed.
- English usage, grammar, spelling, vocabulary and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and County staff.

Senior Retirement Counselor

In addition to the above:

- Rules, regulations, policies, and procedures of the County Employees' Retirement Act of 1937.
- Principles and practices of interpreting and applying the provisions of retirement laws and CCCERA policies.
- Methods and techniques of calculating a diverse range of retirement planning options.
- Regulations and laws related to divorce and property settlements, and death benefits.
- Methods and techniques of training new staff in work procedures.
- Applicable policies, technical processes, and procedures related to benefit program operations and services.

Ability to:

Retirement Counselor

- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.
- Work in a fast-paced environment with multiple deadlines.
- Conduct retirement related presentations to small groups of members.

- Learn the rules, regulations, policies, and procedures of the County Employees' Retirement Act of 1937.
- Learn to interpret and apply the provisions of retirement laws and CCCERA policies.
- Learn the methods and techniques of calculating a diverse range of retirement planning options.
- Learn the regulations and laws related to divorce and property settlements, and death benefits.
- Learn the technical processes and procedures related to benefit program operations and services including payroll processing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Demonstrate strong customer service skills.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Senior Retirement Counselor

In addition to the above:

- Communicate complex information in a manner easily understood by the client.
- Research and compile data relative to payrolls, retirement benefits and actuarial reports.
- Analyze and evaluate information, draw valid conclusions, and make recommendations.
- Independently initiate and respond to correspondence.
- Calculate a wide variety of retirement planning options.
- Counsel members on the divorce process and required documentation.
- Serve as a resource to lower level staff on plan operations.
- Assist in the planning and implementation of special projects.
- Work with information technology staff to test and approve new software builds within the department.
- As assigned, train new staff in work procedures.
- Research and resolve/recommend resolution to the more complicated retirement plan transactions such as wage garnishments, divorce and property settlements, and death benefits.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Retirement Counselor

Equivalent to the completion of twelfth (12th) grade and two (2) years of experience as a Retirement Services Technician, or three (3) years of increasingly responsible experience in a public or corporate retirement system at a level comparable to the Retirement Services Technician class.

Senior Retirement Counselor

One (1) year of experience in the Retirement Counselor classification, and after gaining the knowledge, skill, and experience which meet the qualifications for the work, and after demonstrating the ability to perform the work of the higher-level class.

Licenses and Certifications:

- None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

RETIREMENT SERVICES TECHNICIAN

DEFINITION

Under general supervision, provides specialized support to the Retirement Services and the Member Services Departments; performs specialized and detailed mathematical calculations for retirement service credits and purchases; reviews documentation for new hires and processes these members into the system; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from supervisory and management staff. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This class is distinguished by its responsibility for processing paperwork for new system members, evaluating member placement within the retirement system, and for performing retirement related calculations such as estimates, service credits and purchase contracts.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Receives, reviews, and processes paperwork and member enrollment forms, to enter members into the retirement system; reviews documents for accuracy and requests clarifying or additional information by submitting correspondence to members or other agency retirement system staff; conducts an initial assessment of placement within a system tier by evaluating classification, bargaining unit agreement, age upon entry into the system, membership in other retirement systems, and any related factors which would influence the benefits to which the member is entitled; identifies the applicable contribution rates; sets up and maintains employee master retirement file records.
- Reviews member agency transaction activity reports for new hires, changes in hours for members, and related items which impact member benefits; identifies and processes payroll changes; proofs spreadsheets and submits payroll sheets to appropriate recipients.
- Integrates information from payroll sheets and member enrollment forms to sub ledger sheets and identifies proper sub ledger code; directs demographic changes to CCCERA's Pension Administration System (CPAS) such as name, address and beneficiary changes; processes approved missed contribution adjustments and refunds for designated member groups.
- Conducts I30 audits to verify system accuracy by comparing data within CPAS to documentation submitted by member agencies.
- Provides assistance in determining member reciprocity from service within other retirement systems; facilitates forms and letters to agencies for counselor staff; ensures that proper service credit and details are reported; serves as liaison with other agency representatives to complete transactions; maintains logs and records.

- Communicates with participating districts, members, and other agencies regarding document completion.
- Performs retirement calculations, such as service credits, purchase contracts, conversions, and estimates of future pension benefits; enters calculations into CPAS to confirm that manual calculations are accurate.
- Enters and reviews CPAS data for a variety of purposes including making certain that retiree payroll deductions are correct, and updating tax or payment instructions; verifies that all instructions are signed by appropriate party.
- Sends notifications to retirees requesting updates on addresses and methods of contact; receives and enters data into CPAS.
- Performs general office duties including preparing and processing letters and forms, filing, photocopying, maintaining records, and compiling data for forms and reports.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Accepted principles, practices, purpose, and operations of an Employees' Retirement System.
- Principles and practices of effective customer service.
- Principles and practices of maintaining confidential member records.
- Basic mathematical techniques.
- Modern office practices, methods, and computer equipment and applications related to the work performed.
- English usage, grammar, spelling, vocabulary, and punctuation.

Ability to:

- Input and update information into pension administration software.
- Perform audits and validate accuracy of information.
- Identify, research, and resolve retirement contribution and service credit issues pertaining to member retirement accounts.
- Perform accurate calculations requiring the use of basic mathematical skills.
- Perform a variety of retirement plan related calculations.
- Work in a fast-paced environment with multiple deadlines.
- Learn and apply the applicable rules, regulations, policies, and procedures of the County Employees' Retirement Act of 1937 relevant to work performed.
- Maintain confidentiality.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Demonstrate strong customer service skills.
- Operate modern office equipment including computers and specialized software applications relevant to work performed.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Demonstrate strict confidentiality, professionalism, integrity, and compliance with applicable laws and regulations at all times.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of twelfth (12th) grade and two (2) years of clerical accounting, payroll, or retirement plan administration experience.

Licenses and Certifications:

➤ None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds with the use of proper equipment.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.



September 25th, 2017

Total Compensation Study

Final Report

Contra Costa County Employees' Retirement
Association

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September 25th, 2017

Christina Dunn
Deputy Chief Executive Officer
Contra Costa County Employees' Retirement Association
1355 Willow Way, Suite 221
Concord, CA 94520

Dear Christina,

Koff & Associates is pleased to present the Total Compensation Study Final Report to the Contra Costa Employees' Retirement Association ("CCCERA"). This report documents the market compensation survey methodology, findings, and recommendations for implementation.

We would like to thank you for your assistance and cooperation without which this study could not have been brought to its successful completion.

We will be glad to answer any questions or clarify any points as you are implementing the findings and recommendations. It was a pleasure working with CCCERA and we look forward to future opportunities to provide you with professional assistance.

Very truly yours,



Katie Kaneko
President



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EXECUTIVE SUMMARY

Background

In July, 2017, Koff & Associates (“K&A”) conducted a comprehensive Total Compensation Study for CCCERA. All compensation findings and recommendations are presented in this report.

This compensation review process was precipitated by:

- The concern of the Board of Directors and management that employees should be recognized for the level and scope of work performed and that they are paid on a fair and competitive basis that allows CCCERA to recruit and retain a high-quality staff;
- The desire to have a compensation plan that can meet the needs of CCCERA; and
- The desire to ensure that internal relationships of salaries are based upon objective, non-quantitative evaluation factors, resulting in equity across CCCERA.

The goals of the compensation study are to assist CCCERA in developing a competitive pay and benefit plan, which is based upon market data, and to ensure that the plan is fiscally responsible and meets the needs of CCCERA with regards to recruitment and retention of qualified staff.

Summary of Findings

This report summarizes the study methodology, analytical tools, and the total compensation (salary and benefits) survey findings. The results of the total compensation study showed:

- CCCERA’s **base salaries, overall, in comparison to the market median is 1.3% above the market.**
- CCCERA’s **total compensation, overall, in comparison to the market median is 5.5% above the market.**
- CCCERA’s **benefits package** puts CCCERA in a more competitive position compared to the market and, therefore, salary decisions should be based on total compensation versus base salary market results.
- K&A considers a classification falling within 5% of the median to be competitive.

STUDY PROCESS

Benchmark Classifications

The study included nine (9) classifications, five (5) classifications were selected in order to collect salary and benefits data within the defined labor market. Classifications that we would expect to provide a sufficient sample for analysis were selected as “benchmarks” to use as the basis to build the compensation plan. Benchmark classifications are those classifications that are compared to the market, and these classifications are used as a means of anchoring CCCERA’s overall compensation plan to the market. Other classifications not surveyed will be included in



the compensation plan and aligned to the benchmark classifications using internal equity principles.

The benchmark classifications are listed in Table 1.

Table 1. Benchmark Classification

Classification Title
1. Accounting Technician
2. Executive Assistant
3. Member Services Specialist
4. Retirement Services Technician
5. Senior Retirement Counselor

Comparator Agencies

Another important step in conducting a market salary study is the determination of appropriate agencies for comparison. In developing the list of potential comparator agencies, K&A utilized agencies that CCCERA approved and selected in the 2015 total compensation study. Agencies were chosen based on the following factors:

- 1. Organizational type and structure** – It is generally recommended that agencies of a similar size and providing similar services to that of the CCCERA be used as comparators.

When it comes to technical classes, the size of an organization is not as critical, as these classes perform fairly similar work. The difference in size of an organization becomes more important when comparing classes at the management level. The scope of work and responsibility for management becomes much larger as an organization grows. Factors such as management of a large staff, consequence of error, the political nature of the job, and its visibility all grow with larger organizations. When it is difficult to find agencies that are similarly sized, it is important to get a good balance of smaller and larger agencies.
- 2. Similarity of population, staff, and operational budgets** – These elements provide guidelines in relation to resources required (staff and funding) and available for the provision of services.
- 3. Scope of services provided** – For the majority of classifications, it is important to select agencies providing similar services. Organizations providing the same services are ideal for comparators and most comparator agencies surveyed provide similar services to CCCERA.
- 4. Labor market and geographic location** – In the reality that is today’s labor market, many agencies are in competition for the same pool of qualified employees. No longer do



individuals necessarily live in the communities they serve. The geographic labor market area, where CCCERA may be recruiting from or losing employees to, was taken into consideration when selecting comparator organizations. Furthermore, by selecting employers within a geographic proximity to CCCERA, the resulting labor market data generally reflects the region's cost of living, housing costs, growth rate, and other demographic characteristics to the same extent as competing employers to CCCERA.

All factors mentioned should be considered in selecting the group of comparator agencies. CCCERA agreed to a list of twelve (12) agencies.

Table 2. Comparator Agencies

Agency
1. Alameda County Employees' Retirement Association
2. Central Contra Costa Sanitary District
3. City and County of San Francisco Retirement System
4. Contra Costa County
5. Contra Costa County Water District
6. East Bay Municipal Utility District
7. Orange County Employees Retirement System
8. Sacramento County Employees Retirement System
9. San Bernardino County Employees Retirement Association
10. San Diego County Employees Retirement Association
11. San Mateo County Employees Retirement Association
12. Ventura County Employees Retirement Association

Salary and Benefits Data

The last element requiring discussion prior to beginning a market survey is the specific benefit data that will be collected and analyzed. The following salary and benefits data was collected for each benchmark classification (the cost of these benefits to each agency was converted into dollar amounts and can be found in Appendix II [Benefit Detail] of this report; these amounts were added to base salaries for total compensation purposes).



1. Monthly Base Salary

The top of the salary range and/or control point. All figures are presented on a monthly basis.

2. Employee Retirement

The retirement reflects the benefits offered to the majority of the employees:

- **PERS Formula:** The service retirement formula.
- **Enhanced Formula Cost:** The baseline PERS formula is 2%@55. There is typically a cost to the employer for offering a formula with a higher benefit than the baseline formula. For each enhanced formula, the cost to the employer is based on a percentage range calculated by PERS. K&A took the midpoint of the range and multiplied the percentage by the top monthly salary to calculate the cost of the enhanced formula. The percentage value for each enhanced formula is:
 - 2.5%@55: midpoint of range = 4.95%
 - 2.7%@55: midpoint of range = 8.05%
 - 3%@60: midpoint of range = 9.80%
- **Employer Paid Member Contribution:** The amount of the employee's contribution to PERS that is paid by the employer (Employer Paid Member Contribution).
- **Single Highest Year:** The period for determining the average monthly pay rate when calculating retirement benefits. The base period is 36 highest paid consecutive months. When final compensation is based on a shorter period of time, such as 12 months' highest paid consecutive months, there is a cost to the employer. Similar to the enhanced formula, the cost to the employer is based on a percentage range calculated by PERS. K&A took the midpoint of the range (1.35%) and multiplied the percentage by the top monthly salary to calculate the cost of the final compensation.
- **Social Security:** If an employer participates in Social Security, then the employer contribution of 6.2% of the base salary up to the federally-determined maximum contribution of \$657.20 per month was reported.
- **Other:** Any other retirement contributions made by the employer.

3. Deferred Compensation

Deferred compensation contributions provided to all employees of a classification with or without requiring the employee to make a contribution is reported.

4. Insurances

The employer paid premiums for an employee with family coverage was reported. The employer paid insurances included:

- Cafeteria/Flexible Benefit Plan
- Medical



- Dental
- Vision
- Life and Accidental Death and Dismemberment (“AD&D”) Insurances
- Long-Term Disability Insurance
- Short-Term Disability Insurance
- Other

5. Leaves

Other than sick leave, which is usage-based, the number of hours off for which the employer is obligated. All hours have been translated into direct salary costs.

- **Vacation:** The number of paid time off (or vacation) hours available to all employees who have completed five years of employment.
- **Holidays:** The number of holiday hours (including floating hours) available to employees.
- **Administrative:** Administrative (or management) leave is normally the number of paid leave hours available to Fair Labor Standards Act (“FLSA”) Exempt and/or management to reward for extraordinary effort (in lieu of overtime). This leave category may also include personal leave which may be available to augment vacation or other time off.

6. Auto Allowance

This category includes either the provision of an auto allowance or the provision of an auto for personal use only. If a vehicle is provided to any classification for commuting and other personal use, the average monthly rate is estimated at \$450. Mileage reimbursement is not included.

7. Other

This category includes any additional other benefits not captured above available to all in the class.

All of the benefit elements are negotiated benefits provided to all employees in the classification. As such, they represent an ongoing cost for which an agency must budget. Other benefit costs, such as sick leave, tuition reimbursement, and reimbursable mileage are usage-based and cannot be quantified on an individual employee basis.

Data Collection

Data was collected during the months of July to August 2017, through comparator agency websites, conversations with human resources, accounting, and/or finance personnel, and careful review of agency documentation such as classification descriptions, memoranda of understanding, organization charts, and other documents.



Matching Methodology

K&A believes that the data collection step is the most critical for maintaining the overall credibility of any study and relied on CCCERA's classification descriptions as the foundation for comparison.

When K&A researches and collects data from the comparator agencies to identify possible matches for each of the benchmark classifications, there is an assumption that comparable matches may not be made that are 100% equivalent to the classifications at CCCERA. Therefore, K&A does not match based upon job titles, which can often be misleading, but rather analyze class descriptions before a comparable match is determined.

K&A's methodology is to analyze each class description and the whole position by evaluating factors such as:

- Definition and typical job functions;
- Distinguishing characteristics;
- Level within a class series (i.e., entry, experienced, journey, specialist, lead, etc.);
- Reporting relationship structure (for example, manages through lower-level staff);
- Education and experience requirements;
- Knowledge, abilities, and skills required to perform the work;
- The scope and complexity of the work;
- Independence of action/responsibility;
- The authority delegated to make decisions and take action;
- The responsibility for the work of others, program administration, and for budget dollars;
- Problem solving/ingenuity;
- Contacts with others (both inside and outside of the organization);
- Consequences of action and decisions; and
- Working conditions.

In order for a match to be included, K&A requires that a classification's "likeness" be at approximately 70% of the matched classification.

When an appropriate match is not identified for one classification, K&A often uses "brackets" which can be functional or represent a span in scope of responsibility. A functional bracket means that the job of one classification at CCCERA is performed by two or more classifications at a comparator agency. A "bracket" representing a span in scope means that the comparator agency has one class that is "bigger" in scope and responsibility and one class that is "smaller," where CCCERA's class falls in the middle.

If an appropriate match could not be found, then no match was reported as a non-comparable (N/C).

Data Spreadsheets

For each benchmark classification, there are three information pages:



- Top Monthly Base Salary Data
- Benefit Detail (Monthly Equivalent Values)
- Total Compensation Data

The average (mean) and median (midpoint) of the comparator agencies are reported on the top monthly salary and total compensation data spreadsheets. The % above or below that CCCERA is compared to the average and median is also reported.

The mean is the sum of the comparator agencies' salaries/total compensation divided by the number of matches. The median is the midpoint of all data with 50% of data points below and 50% of data points above.

In order to calculate the mean and median, K&A requires that there be a minimum of four (4) comparator agencies with matching classifications to the benchmark classification. The reason for requiring a minimum of four matches is so that no one classification has undue influence on the calculations. Sufficient data was collected from the comparator agencies for 5 of the 5 benchmark classifications.

When using survey data to make salary range recommendations and adjustments, K&A recommends using the median, rather than the mean, because the median is not skewed by extremely high or low salary values.

MARKET COMPENSATION FINDINGS

The following table represents a summary of the market top monthly (base) salary and total compensation (base salary plus benefits [retirement, insurance, leaves, and allowances]) findings. For each benchmark classification, the number of matches (agencies with a comparable position) and percent above or below the top monthly salary market median and total compensation market median is listed. The table is sorted by top monthly salary in descending order from the most positive percentile (above market) to the most negative (below market).

Table 3. Market Compensation Results Summary

Classification Title	# of Matches	Top Monthly % Above or Below	Total Compensation % Above or Below
Retirement Services Technician	7	5.1%	14.0%
Accounting Technician	12	3.3%	1.3%
Member Services Specialist	8	1.4%	6.0%
Senior Retirement Counselor	8	-1.4%	5.7%
Executive Assistant	12	-1.9%	0.3%



Base Salary

Top monthly salary market results show that three (3) classifications are paid above the market median:

- Two (2) classifications are paid above the market median by less than 5%;
- One (1) classification is paid above the market median by more than 5% and less than 10%

Top monthly salary market results show that two (2) are paid below the market median:

- Two (2) classifications are paid below the market median by less than 5%

Generally, a classification falling within 5% of the median is considered to be competitive in the labor market for salary survey purposes because of the differences in compensation policy, actual scope of work, and position requirements. However, CCCERA can adopt a different standard.

Total Compensation

Total compensation market results show that all five (5) classifications are paid above the market median:

- Two (2) classifications are paid above the market median by less than 5%;
- Two (2) classifications are paid above the market median by more than 5% and less than 10%; and
- One (1) classification is paid above the market median by more than 10% and less than 15%.

Total compensation market results show that no classifications are paid below the market median. Overall, the differences between market base salaries and total compensation indicate that CCCERA's benefits package places CCCERA in a more competitive position. Further analysis indicates that, on average, classifications are 1.3% above the market median for base salaries, while that figure changes to 5.5% above the market median for total compensation, which is a 4.3% difference (i.e., CCCERA "gains" a 4.2% competitive position when taking benefits into consideration).

Benefits

Further analysis of the market benefit data reveals the differences between CCCERA's benefits versus the comparator agencies:

- The Benefit formula offered by CCCERA for "classic" member employees is 2%@55. Three (3) comparator agencies offer an equivalent benefit formula; four (4) agencies offer a richer retirement benefit with three (3) comparators at 2.5%@55; one (1) comparator agency at 2.7%@55; and four (4) agencies offer a lesser retirement benefit of 2%@60.
- Only four (4) comparator agencies offer the single highest year enhancement in order to calculate retirement benefits.



- CCCERA offers a comprehensive insurance package, including health, dental, vision, and life insurance; six (6) comparator agencies contribute less to health insurances; and six (6) comparator agencies contribute more to health insurances.
- Five (5) comparators contribute to deferred compensation.
- Overall, the combination of employee retirement, insurance contributions, and deferred compensation place CCCERA in a more competitive position within the market.

INTERNAL SALARY RELATIONSHIPS

Building from the salary levels established for identified benchmark classes, internal salary relationships were developed and consistently applied in order to develop specific salary recommendations for all non-benchmarked classifications.

In the future, CCCERA may need to utilize internal alignment practices if the number of staff grows and additional classifications are added or classifications change. While analyzing internal relationships, the same factors analyzed when comparing CCCERA's classifications to the labor market are used when making internal salary alignment recommendations.

In addition, the following are standard human resources practices that are commonly applied when making salary recommendations based upon internal relationships:

- A salary within 5% of the market average or median is considered to be competitive in the labor market for salary survey purposes because of the differences in compensation policy and actual scope of the position and its requirements. However, CCCERA can adopt a closer standard.
- Certain internal percentages are often applied. Those that are the most common are:
 - The differential between a trainee and experienced (or journey) class in a series (I/II or Trainee/Experienced) is generally 10% to 15%;
 - A lead or advanced journey-level (III or Senior-level) class is generally placed 10% to 15% above the journey-level.
 - A full supervisory class is normally placed at least 10% to 25% above the highest level supervised, depending upon the breadth and scope of supervision.
- When a market or internal equity adjustment is granted to one class in a series, the other classes in the series are also adjusted accordingly to maintain internal equity.

Internal equity between certain levels of classifications is a fundamental factor to be considered when making salary decisions. When conducting a market compensation survey, results can often show that certain classifications that are aligned with each other are not the same in the outside labor market. However, as an organization, careful consideration should be given to these alignments because they represent internal value of classifications within job families, as well as across the organization.

For the purposes of this study, K&A utilized market data to develop the salary recommendations for all of the benchmarked classifications, and used internal equity principles to make the salary recommendations for five (5) classifications that were not benchmarked. For the non-



benchmarked classifications, internal alignments with other classifications will need to be considered, either in the same class series or those classifications that have similar scope of work, level of responsibility, and “worth” to CCCERA. Where it is difficult to ascertain internal relationships due to unique qualifications and responsibilities, reliance can be placed on past internal relationships. It is important for CCCERA management to carefully review these internal relationships and determine if they are still appropriate given the current market data.

It is also important to analyze market data and internal relationships within class series as well as across the organization, and make adjustments to salary range placements, as necessary, based on the needs of the organization.

CCCERA may want to make internal equity adjustments or alignments, as it implements the compensation strategy. This market survey is only a tool to be used by CCCERA to determine market indexing and salary determination.

RECOMMENDATIONS

Pay Philosophy

CCCERA has many options regarding what type of compensation plan it wants to implement. This decision will be based on what CCCERA's pay philosophy is, at which level it desires to pay its employees compared to the market, whether it is going to consider additional alternative compensation programs, and how great the competition is with other agencies over recruitment of a highly-qualified workforce.

Proposed Salary Structure

Currently, CCCERA has a salary structure for represented employees with salary ranges of varying steps, two (2) classifications have eight (8) steps, two (2) classifications have seven (7) steps, seven (7) classifications have six (6) steps, and two (2) classifications have five (5) steps with 5% between each step. It is recommended that CCCERA create a structure with ranges that are approximately 2.5% apart from one another, with each range containing five (5) steps with 5% between each step. Appendix III contains the recommended salary range structure.

It is important to note that the salary range structure connects all salary ranges, and their steps, by formula, thereby allowing for COLAs to be applied to only one-dollar figure in the table/matrix, which then automatically updates the entire table. Due to the formula that connects each range to the next (with 2.5% differentials between each range), there is a compounding effect when drawing relationships that span several ranges. For example, with 2.5% differentials between ranges, four ranges should represent a 10% differential. However, because the compounding effect of 2.5%, on top of 2.5%, on top of 2.5%, and so on, the differential between Range 1 and Range 5 is not exactly 10%, but it is slightly greater.



Proposed Salary Range Placements

Appendix IV illustrates the proposed salary range placement for each classification based on the market data as well as the internal relationship analysis. The recommendations are based on total compensation market results. The following calculation was used:

1. Multiplied the CCCERA's current top monthly salary by the percentage difference between CCCERA's base salary and the total compensation market median to calculate the Market Placement Salary.
2. The classification was then placed within the proposed salary range with a Step 5 salary closest to the Market Placement Salary.

K&A also modified the current internal alignment in certain instances where it seemed warranted based on market-supported groupings and/or compaction issues.

For all classifications, this primary implementation procedure must be completed only at the initial time of implementation. In the future, if CCCERA decides to implement annual across-the-board cost of living adjustment increases, only the salary schedule that was developed and included herein needs to be increased by the appropriate percentage, and each individual salary range will move up with this adjustment. This will ensure that the internal salary relationships are preserved and the salary schedule remains structured and easily administered.

Options for Implementation

Overall, CCCERA's total compensation is above the market median. When classifications are over market, K&A typically recommends Y-rating employees whose current pay exceeds the maximum of the recommended range until the market numbers "catch up" with their current salary. To Y-rate an employee means to keep the employee's salary frozen and to provide no salary increases (including no cost of living adjustments) until the employee's current salary is within the recommended salary range. This will result in no immediate loss of income, but will delay any future increases until the incumbent's salary is within the salary range.

Other options to "freezing" a classification's salary in place until the market catches up are:

- **"Grandfathering" of salary ranges:** This means that the salary range for the classification is adjusted down to what the market numbers are. However, current incumbents would continue being paid at the current rate of pay (which would put them outside of the new and adjusted salary range for the class) until they separate from employment with CCCERA. Any new-hires would be paid within the newly established salary range.
- **Single-incumbent classes:** If a class only has one incumbent, an option would be to wait until the person separates from employment with CCCERA and then adjust the salary range for the class according to the market.
- **Recent hires:** Some employees who have recently been hired may still be at one of the lower steps within their current salary range. So, even if the top of their current salary range is above market, the incumbents are currently still paid below the market maximum because they are not at the top of their current salary range. In this case, an immediate



salary range adjustment could be made to bring the salary range within the market. This would bring the affected incumbents either to the top of the market range or very close to it, but they would not technically be Y-rated or lose any pay.

Another option, of course, is to actually reduce salaries to the market median. However, from an employee relations perspective this may not be a viable option.

USING THE MARKET DATA AS A TOOL

K&A would like to reiterate that this report and the findings are meant to be a tool for CCCERA to create and implement an equitable compensation plan. Compensation strategies are designed to attract and retain excellent staff; however, financial realities and CCCERA's expectations may also come into play when determining appropriate compensation philosophies and strategies. The collected data presented herein represents a market survey that will give CCCERA an instrument to make future compensation decisions.

It has been a pleasure working with CCCERA on this critical project. Please do not hesitate to contact us if we can provide any additional information or clarification regarding this report.

Respectfully submitted by,

Koff & Associates

A handwritten signature in black ink, appearing to read 'Katie Kaneko', written over a faint, illegible background.

Katie Kaneko

President



Appendix I

Results Summary

Contra Costa County Employees' Retirement Association
Results Summary
July 2017

Classification	Top Monthly Salary Data				Total Monthly Comp Data				# of Matches
	Top Monthly Salary	Average	% above or below	Median	Average	% above or below	Median	% above or below	
Accounting Technician	\$5,446	\$5,408	-2.4%	\$5,164	\$8,766	0.2%	\$8,648	1.3%	12
Executive Assistant	\$6,916	\$7,086	-2.5%	\$7,047	\$10,517	-3.0%	\$10,488	0.3%	12
Member Services Specialist	\$5,718	\$6,100	-6.7%	\$5,640	\$9,090	1.1%	\$8,546	6.0%	8
Retirement Services Technician	\$4,989	\$4,875	2.3%	\$4,735	\$8,222	8.1%	\$7,072	14.0%	7
Senior Retirement Counselor	\$5,718	\$6,212	-8.7%	\$5,797	\$9,090	-0.3%	\$8,570	5.7%	8
		AVERAGE: -3.6%		AVERAGE: 1.3%		AVERAGE: 1.2%		AVERAGE: 5.5%	



Appendix II

Market Compensation Findings

Contra Costa County Employees' Retirement Association
Top Monthly Salary Data
July 2017

Accounting Technician												
Rank	Comparator Agency	Class Title	Top Monthly Salary	Cost of Labor	Adjusted Top Step Salary	Effective Date	Next Salary Increase	Next Percentage Increase				
1	Central Contra Costa County Sanitary District	Accounting Technician III	\$7,609		\$7,609	4/18/2017	Unknown	Unknown				
2	East Bay Municipal Utility District	Accounting Technician	\$6,854		\$6,854	4/16/2016	Unknown	Unknown				
3	Contra Costa County Water District	Account Clerk II	\$6,174		\$6,174	7/1/2017	Unknown	Unknown				
4	Contra Costa County Employees' Retirement Association	Accounting Technician	\$5,446		\$5,446	7/1/2017						
5	San Mateo County Employees Retirement Association	Retirement Accounting Technician II	\$5,290		\$5,290	10/19/2016	10/8/2017	2-3%				
6	City/County San Francisco Retirement System	Account Clerk	\$5,278		\$5,278	7/1/2017	Unknown	Unknown				
7	San Bernardino County Employees Retirement Association	Accounting Technician Fiscal	\$4,725	11.5%	\$5,268	12/24/2016	1/1/2018	CPI 2% max				
8	Sacramento County Employees Retirement System	Accounting Technician	\$4,775	9.8%	\$5,243	6/25/2017	Unknown	Unknown				
9	Ventura County Employees Retirement Association	Accounting Technician	\$4,772	8.7%	\$5,187	1/15/2017	1/14/2018	1.5%				
10	Contra Costa County	Accounting Technician	\$5,164		\$5,164	7/1/2017	7/1/2018	3%				
11	Alameda County Employees Retirement Association	Accounting Technician	\$5,144		\$5,144	7/2/2017	7/1/2018	3.50%				
12	Orange County Employees Retirement System	Accounting Technician	\$4,628	7.5%	\$4,975	7/7/2017	Unknown	Unknown				
13	San Diego County Employees Retirement Association	Retirement Accounting Specialist	\$4,443	9.8%	\$4,878	6/23/2017	Unknown	Unknown				
Average of Comparators			\$5,408		\$5,578							
% CCCERA Above/Below			0.7%		-2.4%							
Median of Comparators			\$5,164		\$5,268							
% CCCERA Above/Below			5.2%		3.3%							
Number of Matches			13		13							

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

**Contra Costa County Employees' Retirement Association
Benefits Detail
July 2017**

Agency	Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Accounting Technician												
Class Title	Accounting Technician											
Top Monthly Salary	\$5,446	\$7,609	\$5,278	\$5,164	\$6,174	\$6,854	\$4,975	\$5,243	\$5,268	\$4,878	\$5,290	\$5,187
Employee Retirement PERS Formula	2%@55	2%@55	2%@60	2%@55	2.5%@55	2.5%@55	2.7%@55	2%@60	2%@55	2.5%@55	2%@60	2%@60
Enhanced PERS Formula	-\$157		-\$161		\$306	\$339	\$400	-\$160		\$241	-\$161	-\$158
ER Paid Member Contrib	\$74			\$83	\$62				\$369		\$159	
12 Month Highest Salary	\$338	\$103	\$327	\$320	\$383	\$425	\$308	\$325	\$71	\$302	\$328	\$322
Social Security												
Other												
Insurance												
Cafeteria												
Health	\$2,501	\$100	\$1,760	\$2,406	\$1,907	\$3,012	\$1,272	\$1,418	\$1,026	\$1,351	\$2,382	\$752
Dental	\$124	\$3,720	\$179	\$77	\$164	\$224		\$125	\$21		\$86	\$21
Vision	\$8	\$205			\$17	\$24			\$6		\$15	\$15
Life 1	\$4	\$21	\$4	\$1	\$22	\$17		\$1	\$3	\$1	\$2	\$3
LTD 2		\$26	\$19		\$20	\$18				\$7	\$16	
STD/SIDI												
Other 4												
Leave												
Vacation	\$314	\$468	\$305	\$298	\$403.66	\$395	\$517	\$302	\$304	\$281	\$326	\$379
Holidays	\$314	\$380	\$305	\$199	\$309	\$395	\$230	\$272	\$284	\$244	\$244	\$219
Administrative		\$29										
Auto Allowance		\$472		\$150		\$75			\$57		\$53	\$91
Uniform Allowance	\$150											
Deferred Compensation												
Other 3												
Longevity												
Benefit Cost	\$3,504	\$5,524	\$2,898	\$3,521	\$3,371	\$4,587	\$2,379	\$2,444	\$2,139	\$2,187	\$3,611	\$1,766
Total Monthly Comp.	\$8,766	\$13,133	\$8,176	\$8,685	\$9,545	\$11,441	\$7,354	\$7,687	\$7,407	\$7,065	\$8,901	\$6,953

Note: Total Monthly Compensation number may vary slightly from the sum of its components due to cell formulas & rounding.

- 1- San Diego County ERA's Life Insurance and LTD rates are from a previous study in 2015.
- 2- San Mateo County ERA: Flat rate provided from 2015 because they are currently reformulating their premiums.
- 3- East Bay MUD - Supplemental benefits program.
- 4- Orange County ERS: Amount covers the cost of Life Insurance, Long Term Disability, Vision, & Dental and is to be administered by the unions.

Contra Costa County Employees' Retirement Association
Total Monthly Compensation Data
July 2017

Accounting Technician		Class Title	Total Monthly Comp	Effective Date	Next Salary Increase	Next Percentage Increase
1	Central Contra Costa County Sanitary District	Accounting Technician III	\$13,133	4/18/2017	Unknown	Unknown
2	East Bay Municipal Utility District	Accounting Technician	\$11,441	4/16/2016	Unknown	Unknown
3	Contra Costa County Water District	Account Clerk II	\$9,545	7/1/2017	Unknown	Unknown
4	San Mateo County Employees Retirement Association	Retirement Accounting Technician II	\$8,901	10/19/2016	10/8/2017	2-3%
5	Contra Costa County Employees' Retirement Association	Accounting Technician	\$8,766	7/1/2017		
6	Contra Costa County	Accounting Technician	\$8,685	7/1/2017	7/1/2018	3%
7	Alameda County Employees Retirement Association	Accounting Technician	\$8,648	7/2/2017	7/1/2018	3.50%
8	City/County San Francisco Retirement System	Account Clerk	\$8,176	7/1/2017	Unknown	Unknown
9	Sacramento County Employees Retirement System	Accounting Technician	\$7,687	6/25/2017	Unknown	Unknown
10	San Bernardino County Employees Retirement Association	Accounting Technician Fiscal	\$7,407	12/24/2016	1/1/2018	CPI 2% max
11	Orange County Employees Retirement System	Accounting Technician	\$7,354	7/7/2017	Unknown	Unknown
12	San Diego County Employees Retirement Association	Retirement Accounting Specialist	\$7,065	6/23/2017	Unknown	Unknown
13	Ventura County Employees Retirement Association	Accounting Technician	\$6,953	1/15/2017	1/14/2018	1.5%
Average of Comparators			\$8,751			
% CCCERA Above/Below			0.2%			
Median of Comparators			\$8,648			
% CCCERA Above/Below			1.3%			
Number of Matches			13			

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

Contra Costa County Employees' Retirement Association
Top Monthly Salary Data
July 2017

Executive Assistant		Class Title	Top Monthly Salary	Cost of Labor	Adjusted Top Step Salary	Effective Date	Next Salary Increase	Next Percentage Increase
1	Contra Costa Water District	Administrative Assistant	\$8,278		\$8,278	9/28/2016	Unknown	Unknown
2	Alameda County Employees Retirement Association	Executive Secretary ACERA	\$7,946		\$7,946	1/3/2016	Unknown	Unknown
3	East Bay Municipal Utility District	Executive Assistant II	\$7,951		\$7,951	4/16/2016	Unknown	Unknown
4	Central Contra Costa County Sanitary District	Executive Assistant	\$8,210		\$8,210	4/18/2017	Unknown	Unknown
5	San Bernardino County Employees Retirement Association	Executive Assistant	\$6,748	11.5%	\$7,524	12/24/2016	1/1/2018	CPI 2% max
6	City/County San Francisco Retirement System	Executive Secretary II	\$7,410		\$7,410	7/1/2017	Unknown	Unknown
7	Contra Costa County Employees' Retirement Association	Executive Assistant	\$6,916		\$6,916	7/1/2017		
8	San Mateo County Employees Retirement Association	Retirement Executive Secretary Confidential	\$6,571		\$6,571	10/19/2016	10/8/2017	2-3%
9	San Diego County Employees Retirement Association	Retirement Executive Secretary	\$6,087	9.8%	\$6,684	6/23/2017	unknown	unknown
10	*Ventura County Employees Retirement Association	Management Assistant IV Confidential	\$6,013	8.7%	\$6,536	1/15/2017	1/14/2018	1.5%
11	Contra Costa County	Executive Assistant to the CAO II	\$6,148		\$6,148	7/1/2017	7/1/2018	Unknown
12	Orange County Employees Retirement System	Executive Secretary II	\$5,738	7.5%	\$6,168	7/7/2017	Unknown	Unknown
13	Sacramento County Employees Retirement System	Executive Secretary	\$5,108	9.8%	\$5,609	6/25/2017	Unknown	Unknown

Average of Comparators	\$6,851
% CCCERA Above/Below	0.9%
Median of Comparators	\$6,660
% CCCERA Above/Below	3.7%
Number of Matches	12

NOTE: All calculations exclude CCCERA

N/C - Non Comparator
 *Position vacant

**Contra Costa County Employees' Retirement Association
Benefits Detail
July 2017**

Agency	Executive Assistant	Contra Costa County Employees' Retirement Association	Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Class Title	Executive Assistant		Executive Secretary ACERA	Executive Assistant	Executive Secretary II	Executive Assistant to the CAO II	Administrative Assistant	Executive Assistant II	Executive Secretary II	Executive Secretary	Executive Assistant	Retirement Executive Secretary Confidential	Retirement Executive Secretary Confidential	Management Assistant IV Confidential
Top Monthly Salary	\$6,916		\$7,946	\$8,210	\$7,410	\$6,148	\$8,278	\$7,951	\$6,168	\$5,609	\$7,524	\$6,684	\$6,571	\$6,536
Employee Retirement PERS Formula	2%@55		2%@60 -\$242	2%@55	2%@60 -\$226	2%@55	2.5%@55 \$410	2.5%@55 \$394	2.7%@55 \$497	2%@60 -\$171	2%@55	2.5%@55 \$331	2%@60 -\$200	2%@60 -\$199
Enhanced PERS Formula			\$238				\$248				\$679			
ER Paid Member Contrib	\$93		\$493	\$111	\$459	\$83	\$112	\$493	\$382	\$348	\$102	\$414	\$407	\$405
12 Month Highest Salary	\$429					\$381	\$513							
Social Security														
Other														
Insurance														
Catereria														
Health														
Dental														
Vision														
Life 1														
LTD 2														
STD/SDI														
Other 4														
Leave														
Vacation	\$399		\$458	\$505	\$428	\$355	\$669	\$459	\$641	\$324	\$434	\$386	\$404	\$905
Holidays	\$399		\$458	\$411	\$428	\$236	\$414	\$459	\$285	\$291	\$405	\$334	\$303	\$277
Administrative			\$214	\$95		\$278	\$64							
Auto Allowance														
Uniform Allowance	\$150			\$509		\$150		\$75			\$1,366		\$66	\$196
Deferred Compensation														
Other 3														
Longevity														
Benefit Cost	\$3,601		\$4,492	\$5,832	\$3,281	\$4,013	\$4,488	\$4,787	\$2,632	\$2,507	\$4,109	\$2,494	\$3,714	\$2,586
Total Monthly Comp.	\$10,517		\$12,438	\$14,042	\$10,691	\$10,161	\$12,766	\$12,738	\$8,800	\$8,116	\$11,633	\$9,178	\$10,285	\$9,122

Note: Total Monthly Compensation number may vary slightly from the sum of its components due to cell formulas & rounding.

1- San Diego County ERA's Life Insurance and LTD rates are from a previous study in 2015.

2- San Mateo County ERA: Flat rate provided from 2015 because they are currently reformulating their premiums.

3- East Bay MUD - Supplemental benefits program.

4- Orange County ERS: Amount covers the cost of Life Insurance, Long Term Disability, Vision, & Dental and is to be administered by the unions.

Contra Costa County Employees' Retirement Association
Total Monthly Compensation Data
July 2017

Executive Assistant		Rank	Comparator Agency	Class Title	Total Monthly Comp	Effective Date	Next Salary Increase	Next Percentage Increase
1	Central Contra Costa County Sanitary District			Executive Assistant	\$14,042	4/18/2017	Unknown	Unknown
2	Contra Costa County Water District			Administrative Assistant	\$12,766	9/28/2016	Unknown	Unknown
3	East Bay Municipal Utility District			Executive Assistant II	\$12,738	4/16/2016	Unknown	Unknown
4	Alameda County Employees Retirement Association			Executive Secretary ACERA	\$12,438	1/3/2016	Unknown	Unknown
5	San Bernardino County Employees Retirement Association			Executive Assistant	\$11,633	12/24/2016	1/1/2018	CPI 2% max
6	City/County San Francisco Retirement System			Executive Secretary II	\$10,691	7/1/2017	Unknown	Unknown
7	Contra Costa County Employees' Retirement Association			Executive Assistant	\$10,517	7/1/2017		
8	San Mateo County Employees Retirement Association			Retirement Executive Secretary Confidential	\$10,285	10/19/2016	10/8/2017	2-3%
9	Contra Costa County			Executive Assistant to the CAO II	\$10,161	7/1/2017	7/1/2018	Unknown
10	San Diego County Employees Retirement Association			Retirement Executive Secretary	\$9,178	6/23/2017	unknown	unknown
11	Ventura County Employees Retirement Association			Management Assistant IV Confidential	\$9,122	1/15/2017	1/14/2018	1.5%
12	Orange County Employees Retirement System			Executive Secretary II	\$8,800	7/7/2017	Unknown	Unknown
13	Sacramento County Employees Retirement System			Executive Secretary	\$8,116	6/25/2017	Unknown	Unknown
Average of Comparators					\$10,831			
% CCCERA Above/Below					-3.0%			
Median of Comparators					\$10,488			
% CCCERA Above/Below					0.3%			
Number of Matches					12			

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

Contra Costa County Employees' Retirement Association
Top Monthly Salary Data
July 2017

Member Services Specialist												
Rank	Comparator Agency	Class Title	Top Monthly Salary	Cost of Labor	Adjusted Top Step Salary	Effective Date	Next Salary Increase	Next Percentage Increase				
1	Ventura County Employees Retirement Association	Program Administrator II	\$7,510	8.7%	\$8,164	1/15/2017	1/14/2018	1.5%				
2	City/County San Francisco Retirement System	Assistant Retirement Analyst	\$7,323		\$7,323	7/1/2017	Unknown	Unknown				
3	San Mateo County Employees Retirement Association	Retirement Analyst	\$6,587		\$6,587	10/19/2016	10/8/2017	2-3%				
4	Contra Costa County Employees' Retirement Association	Member Services Specialist	\$5,718		\$5,718	7/1/2017						
5	Alameda County Employees Retirement Association	Retirement Specialist II	\$5,463		\$5,463	7/2/2017	7/1/2018	3.50%				
6	San Bernardino County Employees Retirement Association	Retirement Specialist	\$5,217	11.5%	\$5,817	12/24/2016	1/1/2018	CPI 2% max				
7	Orange County Employees Retirement System	Retirement Program Specialist	\$5,001	7.5%	\$5,376	7/7/2017	Unknown	Unknown				
8	Sacramento County Employees Retirement System	Retirement Benefits Specialist II	\$4,727	9.8%	\$5,190	6/25/2017	Unknown	Unknown				
9	San Diego County Employees Retirement Association	Retirement Member Services Associate	\$4,443	9.8%	\$4,878	6/23/2017	Unknown	Unknown				
10	East Bay Municipal Utility District	N/C										
11	Contra Costa County Water District	N/C										
12	Central Contra Costa County Sanitary District	N/C										
13	Contra Costa County	N/C										
Average of Comparators			\$5,784		\$6,100							
% CCCERA Above/Below			-1.1%		-6.7%							
Median of Comparators			\$5,340		\$5,640							
% CCCERA Above/Below			6.6%		1.4%							
Number of Matches			8		8							

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

**Contra Costa County Employees' Retirement Association
Benefits Detail
July 2017**

Member Services Specialist		Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Agency	Contra Costa County Employees' Retirement Association	Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Class Title	Member Services Specialist												
Top Monthly Salary	\$5,718	\$5,463	N/C	\$7,323	N/C	N/C	N/C	\$5,376	\$5,190	\$5,817	\$4,878	\$6,587	\$8,164
Employee Retirement PERS Formula	2%@55	2%@60 -\$167		2%@60 -\$223				2.7%@55 \$463	2%@60 -\$158	2%@55	2.5%@55 \$241	2%@60 -\$201 \$198	2%@60 -\$249
Enhanced PERS Formula													
ER Paid Member Contrib	\$77	\$339		\$454				\$333	\$322	\$407 \$79	\$302	\$408	\$506
12 Month Highest Salary	\$355												
Social Security													
Other													
Insurance													
Careteria													
Health	\$1,941	\$2,501		\$1,760				\$1,272	\$1,418	\$1,026	\$1,351	\$2,382	\$752
Dental	\$169	\$124		\$179					\$125	\$21		\$86	
Vision	\$8	\$4		\$4					\$1	\$6		\$15	
Life 1	\$12			\$27						\$3	\$1	\$2	\$3
LTD 2											\$7	\$16	\$60
STD(SDI)													
Other 3								\$52					
Leave													
Vacation	\$330	\$295		\$422				\$558	\$299	\$336	\$281	\$405	\$1,130
Holidays	\$330	\$295		\$422				\$248	\$269	\$313	\$244	\$304	\$345
Administrative													
Auto Allowance													
Uniform Allowance													
Deferred Compensation	\$150									\$63			\$245
Other													
Longevity													
Benefit Cost	\$3,372	\$3,559	N/C	\$3,268	N/C	N/C	N/C	\$2,464	\$2,435	\$2,252	\$2,187	\$3,863	\$3,042
Total Monthly Comp.	\$9,090	\$9,022	N/C	\$10,591	N/C	N/C	N/C	\$7,840	\$7,625	\$8,069	\$7,065	\$10,470	\$11,206

Note: Total Monthly Compensation number may vary slightly from the sum of its components due to cell formulas & rounding.

- 1- San Diego County ERA's Life Insurance and LTD rates are from a previous study in 2015.
- 2- San Mateo County ERA: Flat rate provided from 2015 because they are currently reformulating their premiums.
- 3- Orange County ERS: Amount covers the cost of Life Insurance, Long Term Disability, Vision, & Dental and is to be administered by the unions.

Contra Costa County Employees' Retirement Association
Total Monthly Compensation Data
July 2017

Member Services Specialist													
Rank	Comparator Agency	Class Title	Total Monthly Comp	Effective Date	Next Salary Increase	Next Percentage Increase							
1	Ventura County Employees Retirement Association	Program Administrator II	\$11,206	1/15/2017	1/14/2018	1.5%							
2	City/County San Francisco Retirement System	Assistant Retirement Analyst	\$10,591	7/1/2017	Unknown	Unknown							
3	San Mateo County Employees Retirement Association	Retirement Analyst	\$10,470	10/19/2016	10/8/2017	2-3%							
4	Contra Costa County Employees' Retirement Association	Member Services Specialist	\$9,090	7/1/2017									
5	Alameda County Employees Retirement Association	Retirement Specialist II	\$9,022	7/2/2017	7/1/2018	3.50%							
6	San Bernardino County Employees Retirement Association	Retirement Specialist	\$8,069	12/24/2016	1/1/2018	CPI 2% max							
7	Orange County Employees Retirement System	Retirement Program Specialist	\$7,840	7/7/2017	Unknown	Unknown							
8	Sacramento County Employees Retirement System	Retirement Benefits Specialist II	\$7,625	6/25/2017	Unknown	Unknown							
9	San Diego County Employees Retirement Association	Retirement Member Services Associate	\$7,065	6/23/2017	Unknown	Unknown							
10	Central Contra Costa County Sanitary District	N/C											
11	Contra Costa County	Executive Assistant											
12	Contra Costa County Water District	N/C											
13	East Bay Municipal Utility District	N/C											
Average of Comparators			\$8,986										
% CCCERA Above/Below			1.1%										
Median of Comparators			\$8,546										
% CCCERA Above/Below			6.0%										
Number of Matches			8										

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

Contra Costa County Employees' Retirement Association
Top Monthly Salary Data
July 2017

Retirement Services Technician												
Rank	Comparator Agency	Class Title	Top Monthly Salary	Cost of Labor	Adjusted Top Step Salary	Effective Date	Next Salary Increase	Next Percentage Increase				
1	City/County San Francisco Retirement System	Benefits Technician	\$5,794		\$5,794	7/1/2017	Unknown	Unknown				
2	San Mateo County Employees Retirement Association	Retirement Support Specialist	\$5,448		\$5,448	10/19/2016	10/8/2017	2-3%				
3	Contra Costa County Employees' Retirement Association	Retirement Services Technician	\$4,989		\$4,989	7/1/2017						
4	San Diego County Employees Retirement Association	Retirement Member Services Associate	\$4,443	9.8%	\$4,878	6/23/2017	Unknown	Unknown				
5	Sacramento County Employees Retirement System	Retirement Benefits Specialist I	\$4,297	9.8%	\$4,718	6/25/2017	Unknown	Unknown				
6	Alameda County Employees Retirement Association	Retirement Specialist I	\$4,735		\$4,735	7/2/2017	7/1/2018	3.50%				
7	San Bernardino County Employees Retirement Association	Retirement Benefits Technician	\$3,876	11.5%	\$4,322	12/24/2016	1/1/2018	CPI 2% max				
8	Orange County Employees Retirement System	Retirement Benefits Technician	\$3,935	7.5%	\$4,230	7/7/2017	Unknown	Unknown				
9	Ventura County Employees Retirement Association	N/C										
10	East Bay Municipal Utility District	N/C										
11	Contra Costa County Water District	N/C										
12	Central Contra Costa County Sanitary District	N/C										
13	Contra Costa County	N/C										
Average of Comparators			\$4,647		\$4,875							
% CCCERA Above/Below			6.9%		2.3%							
Median of Comparators			\$4,443		\$4,735							
% CCCERA Above/Below			10.9%		5.1%							
Number of Matches			7		7							

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

**Contra Costa County Employees' Retirement Association
Benefits Detail
July 2017**

Retirement Services Technician		Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Agency	Contra Costa County Employees' Retirement Association												
Class Title	Retirement Services Technician	Retirement Specialist I	N/C	Benefits Technician	N/C	N/C	N/C	Retirement Benefits Technician	Retirement Benefits Specialist I	Retirement Benefits Technician	Retirement Member Services Associate	Retirement Support Specialist	N/C
Top Monthly Salary	\$4,989	\$4,735		\$5,794				\$4,230	\$4,718	\$4,322	\$4,878	\$5,448	
Employee Retirement PERS Formula	2%@55	2%@60 -\$144		2%@60 -\$177				2.7%@55 \$341	2%@60 -\$144	2%@55	2.5%@55 \$241	2%@60 -\$166 \$163	
Enhanced PERS Formula ER Paid Member Contrib	\$67									\$303			
12 Month Highest Salary	\$309	\$294		\$359				\$262	\$293	\$58	\$302	\$338	
Other													
Insurance		\$2,501		\$1,760				\$1,272	\$1,418	\$1,026	\$1,351	\$2,382	
Cafeteria		\$124		\$179					\$125	\$21		\$86	
Health	\$1,941	\$4		\$4					\$1	\$6		\$15	
Dental	\$169			\$21						\$3		\$2	
Vision	\$8											\$7	
Life 1	\$12												
LTD 2													
LTD 3													
STD/SDI													
Other 3													
Other								\$52					
Leave													
Vacation	\$288	\$256		\$334				\$439	\$272	\$249	\$281	\$335	
Holidays	\$288	\$256		\$334				\$195	\$245	\$233	\$244	\$251	
Administrative													
Auto Allowance										\$47		\$54	
Uniform Allowance													
Deferred Compensation	\$150												
Other													
Longevity													
Benefit Cost	\$3,233	\$3,435	N/C	\$2,992	N/C	N/C	N/C	\$2,221	\$2,354	\$1,945	\$2,187	\$3,644	N/C
Total Monthly Comp.	\$8,222	\$8,170	N/C	\$8,786	N/C	N/C	N/C	\$6,451	\$7,072	\$6,267	\$7,065	\$9,092	N/C

Note: Total Monthly Compensation number may vary slightly from the sum of its components due to cell formulas & rounding.

- 1- San Diego County ERA's Life Insurance and LTD rates are from a previous study in 2015.
- 2- San Mateo County ERA: Flat rate provided from 2015 because they are currently reformulating their premiums.
- 3- Orange County ERA: Amount covers the cost of Life Insurance, Long Term Disability, Vision, & Dental and is to be administered by the unions.

Contra Costa County Employees' Retirement Association
Total Monthly Compensation Data
July 2017

Retirement Services Technician		Class Title	Total Monthly Comp	Effective Date	Next Salary Increase	Next Percentage Increase
1	San Mateo County Employees Retirement Association	Retirement Support Specialist	\$9,092	10/19/2016	10/8/2017	2-3%
2	City/County San Francisco Retirement System	Benefits Technician	\$8,786	7/1/2017	Unknown	Unknown
3	Contra Costa County Employees' Retirement Association	Retirement Services Technician	\$8,222	7/1/2017		
4	Alameda County Employees Retirement Association	Retirement Specialist I	\$8,170	7/2/2017	7/1/2018	3.50%
5	Sacramento County Employees Retirement System	Retirement Benefits Specialist I	\$7,072	6/25/2017	Unknown	Unknown
6	San Diego County Employees Retirement Association	Retirement Member Services Associate	\$7,065	6/23/2017	Unknown	Unknown
7	Orange County Employees Retirement System	Retirement Benefits Technician	\$6,451	7/7/2017	Unknown	Unknown
8	San Bernardino County Employees Retirement Association	Retirement Benefits Technician	\$6,267	12/24/2016	1/1/2018	CPI 2% max
9	Central Contra Costa County Sanitary District	N/C				
10	Contra Costa County	N/C				
11	Contra Costa County Water District	N/C				
12	East Bay Municipal Utility District	N/C				
13	Ventura County Employees Retirement Association	N/C				
Average of Comparators			\$7,557			
% CCCERA Above/Below			8.1%			
Median of Comparators			\$7,072			
% CCCERA Above/Below			14.0%			
Number of Matches			7			

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

Contra Costa County Employees' Retirement Association
Top Monthly Salary Data
July 2017

Senior Retirement Counselor												
Rank	Comparator Agency	Class Title	Top Monthly Salary	Cost of Labor	Adjusted Top Step Salary	Effective Date	Next Salary Increase	Next Percentage Increase				
1	Ventura County Employees Retirement Association	Program Administrator II	\$7,510	8.7%	\$8,164	1/15/2017	1/14/2018	1.5%				
2	City/County San Francisco Retirement System	Assistant Retirement Analyst	\$7,323		\$7,323	7/1/2017	Unknown	Unknown				
3	San Mateo County Employees Retirement Association	Retirement Analyst	\$6,587		\$6,587	10/19/2016	10/8/2017	2.3%				
4	Contra Costa County Employees' Retirement Association	Senior Retirement Counselor	\$5,718		\$5,718	7/1/2017						
5	San Diego County Employees Retirement Association	Retirement Member Services Specialist	\$5,262	9.8%	\$5,778	6/23/2017	Unknown	Unknown				
6	Alameda County Employees Retirement Association	Retirement Specialist II	\$5,463		\$5,463	7/2/2017	7/1/2018	3.50%				
7	San Bernardino County Employees Retirement Association	Retirement Specialist	\$5,217	11.5%	\$5,817	12/24/2016	1/1/2018	CPI 2% max				
8	Orange County Employees Retirement System	Retirement Program Specialist	\$5,001	7.5%	\$5,376	7/7/2017	Unknown	Unknown				
9	Sacramento County Employees Retirement System	Retirement Benefits Specialist II	\$4,745	9.8%	\$5,210	6/25/2017	Unknown	Unknown				
10	East Bay Municipal Utility District	N/C										
11	Contra Costa County Water District	N/C										
12	Central Contra Costa County Sanitary District	N/C										
13	Contra Costa County	N/C										
			Average of Comparators		\$5,889				\$6,215			
			% CCCERA Above/Below		-3.0%				-8.7%			
			Median of Comparators		\$5,363				\$5,797			
			% CCCERA Above/Below		6.2%				-1.4%			
			Number of Matches		8				8			

NOTE: All calculations exclude CCCERA

N/C - Non Comparator

**Contra Costa County Employees' Retirement Association
Benefits Detail
July 2017**

Senior Retirement Counselor		Alameda County Employees Retirement Association	Central Contra Costa County Sanitary District	City/County San Francisco Retirement System	Contra Costa County	Contra Costa County Water District	East Bay Municipal Utility District	Orange County Employees Retirement System	Sacramento County Employees Retirement System	San Bernardino County Employees Retirement Association	San Diego County Employees Retirement Association	San Mateo County Employees Retirement Association	Ventura County Employees Retirement Association
Agency	Contra Costa County Employees' Retirement Association												
Class Title	Senior Retirement Counselor												
Top Monthly Salary	\$5,718	\$5,463	N/C	\$7,323	N/C	N/C	N/C	\$5,376	\$5,210	\$5,817	\$5,778	\$6,587	\$8,164
Employee Retirement PERS Formula	2%@55	2%@60 -\$167	N/C	2%@60 -\$223	N/C	N/C	N/C	2.7%@55 \$433	2%@60 -\$159	2%@55 \$407 \$79	2.5%@55 \$286	2%@60 -\$201 \$198	2%@60 -\$249
Enhanced PERS Formula	\$77	\$339		\$454				\$333	\$323	\$79	\$358	\$408	\$506
ER Paid Member Contrib	\$355												
12 Month Highest Salary													
Social Security													
Other													
Insurance													
Careteria	\$1,941	\$2,501		\$1,760				\$1,272	\$1,418	\$1,026	\$1,351	\$2,382	\$752
Health	\$169	\$124		\$179					\$125	\$21	\$86	\$86	
Dental	\$8	\$4		\$4					\$1	\$3	\$1	\$15	
Vision	\$12			\$27								\$2	\$3
Life ¹												\$2	\$3
LTD ²												\$16	\$60
STD/SDI													
Other ³								\$52					
Leave													
Vacation	\$330	\$295		\$422				\$558	\$301	\$336	\$333	\$405	\$1,130
Holidays	\$330	\$295		\$422				\$248	\$271	\$313	\$289	\$304	\$345
Administrative													
Auto Allowance													
Uniform Allowance													
Deferred Compensation	\$150									\$29		\$66	\$245
Other													
Longevity													
Benefit Cost	\$3,372	\$3,559	N/C	\$3,268	N/C	N/C	N/C	\$2,464	\$2,439	\$2,218	\$2,341	\$3,883	\$3,042
Total Monthly Comp.	\$9,090	\$9,022	N/C	\$10,591	N/C	N/C	N/C	\$7,840	\$7,649	\$8,035	\$8,119	\$10,470	\$11,206

Note: Total Monthly Compensation number may vary slightly from the sum of its components due to cell formulas & rounding.

1- San Diego County ERA's Life Insurance and LTD rates are from a previous study in 2015.

2- San Mateo County ERA: Flat rate provided from 2015 because they are currently reformulating their premiums.

3- Orange County ERA: Amount covers the cost of Life Insurance, Long Term Disability, Vision, & Dental and is to be administered by the unions.



Appendix III

Proposed Salary Range Schedule

**Appendix III
Contra Costa County Employee's Retirement Association
Salary Schedule
November 2015**

Salary Range #	Monthly Salary Range					Hourly Salary Range				
	Step 1	Step 2	Step 3	Step 4	Step 5	Step 1	Step 2	Step 3	Step 4	Step 5
1	3410	3580	3759	3947	4145	19.67	20.66	21.69	22.77	23.91
2	3493	3668	3851	4043	4246	20.15	21.16	22.22	23.33	24.49
3	3580	3759	3947	4145	4352	20.66	21.69	22.77	23.91	25.11
4	3668	3851	4043	4246	4458	21.16	22.22	23.33	24.49	25.72
5	3759	3947	4145	4352	4569	21.69	22.77	23.91	25.11	26.36
6	3851	4043	4246	4458	4681	22.22	23.33	24.49	25.72	27.00
7	3947	4145	4352	4569	4798	22.77	23.91	25.11	26.36	27.68
8	4043	4246	4458	4681	4915	23.33	24.49	25.72	27.00	28.35
9	4145	4352	4569	4798	5038	23.91	25.11	26.36	27.68	29.06
10	4246	4458	4681	4915	5161	24.49	25.72	27.00	28.35	29.77
11	4352	4569	4798	5038	5290	25.11	26.36	27.68	29.06	30.52
12	4458	4681	4915	5161	5419	25.72	27.00	28.35	29.77	31.26
13	4569	4798	5038	5290	5554	26.36	27.68	29.06	30.52	32.04
14	4681	4915	5161	5419	5690	27.00	28.35	29.77	31.26	32.82
15	4798	5038	5290	5554	5832	27.68	29.06	30.52	32.04	33.65
16	4915	5161	5419	5690	5974	28.35	29.77	31.26	32.82	34.47
17	5038	5290	5554	5832	6123	29.06	30.52	32.04	33.65	35.33
18	5161	5419	5690	5974	6273	29.77	31.26	32.82	34.47	36.19
19	5290	5554	5832	6123	6430	30.52	32.04	33.65	35.33	37.09
20	5419	5690	5974	6273	6586	31.26	32.82	34.47	36.19	38.00
21	5554	5832	6123	6430	6751	32.04	33.65	35.33	37.09	38.95
22	5690	5974	6273	6586	6916	32.82	34.47	36.19	38.00	39.90
23	5832	6123	6430	6751	7089	33.65	35.33	37.09	38.95	40.90
24	5974	6273	6586	6916	7261	34.47	36.19	38.00	39.90	41.89
25	6123	6430	6751	7089	7443	35.33	37.09	38.95	40.90	42.94
26	6273	6586	6916	7261	7625	36.19	38.00	39.90	41.89	43.99
27	6430	6751	7089	7443	7815	37.09	38.95	40.90	42.94	45.09
28	6586	6916	7261	7625	8006	38.00	39.90	41.89	43.99	46.19
29	6751	7089	7443	7815	8206	38.95	40.90	42.94	45.09	47.34
30	6916	7261	7625	8006	8406	39.90	41.89	43.99	46.19	48.50
31	7089	7443	7815	8206	8616	40.90	42.94	45.09	47.34	49.71
32	7261	7625	8006	8406	8826	41.89	43.99	46.19	48.50	50.92
33	7443	7815	8206	8616	9047	42.94	45.09	47.34	49.71	52.19
34	7625	8006	8406	8826	9268	43.99	46.19	48.50	50.92	53.47
35	7815	8206	8616	9047	9499	45.09	47.34	49.71	52.19	54.80
36	8006	8406	8826	9268	9731	46.19	48.50	50.92	53.47	56.14
37	8206	8616	9047	9499	9974	47.34	49.71	52.19	54.80	57.54
38	8406	8826	9268	9731	10218	48.50	50.92	53.47	56.14	58.95
39	8616	9047	9499	9974	10473	49.71	52.19	54.80	57.54	60.42
40	8826	9268	9731	10218	10729	50.92	53.47	56.14	58.95	61.90
41	9047	9499	9974	10473	10997	52.19	54.80	57.54	60.42	63.44
42	9268	9731	10218	10729	11265	53.47	56.14	58.95	61.90	64.99
43	9499	9974	10473	10997	11547	54.80	57.54	60.42	63.44	66.61
44	9731	10218	10729	11265	11828	56.14	58.95	61.90	64.99	68.24
45	9974	10473	10997	11547	12124	57.54	60.42	63.44	66.61	69.95
46	10218	10729	11265	11828	12420	58.95	61.90	64.99	68.24	71.65
47	10473	10997	11547	12124	12730	60.42	63.44	66.61	69.95	73.44
48	10729	11265	11828	12420	13041	61.90	64.99	68.24	71.65	75.23
49	10997	11547	12124	12730	13367	63.44	66.61	69.95	73.44	77.11
50	11265	11828	12420	13041	13693	64.99	68.24	71.65	75.23	79.00
51	11547	12124	12730	13367	14035	66.61	69.95	73.44	77.11	80.97
52	11828	12420	13041	13693	14377	68.24	71.65	75.23	79.00	82.95
53	12124	12730	13367	14035	14737	69.95	73.44	77.11	80.97	85.02
54	12420	13041	13693	14377	15096	71.65	75.23	79.00	82.95	87.09
55	12730	13367	14035	14737	15474	73.44	77.11	80.97	85.02	89.27
56	13041	13693	14377	15096	15851	75.23	79.00	82.95	87.09	91.45
57	13367	14035	14737	15474	16247	77.11	80.97	85.02	89.27	93.73
58	13693	14377	15096	15851	16643	79.00	82.95	87.09	91.45	96.02
59	14035	14737	15474	16247	17060	80.97	85.02	89.27	93.73	98.42
60	14377	15096	15851	16643	17476	82.95	87.09	91.45	96.02	100.82
61	14737	15474	16247	17060	17913	85.02	89.27	93.73	98.42	103.34
62	15096	15851	16643	17476	18349	87.09	91.45	96.02	100.82	105.86
63	15474	16247	17060	17913	18808	89.27	93.73	98.42	103.34	108.51
64	15851	16643	17476	18349	19267	91.45	96.02	100.82	105.86	111.16
65	16247	17060	17913	18808	19749	93.73	98.42	103.34	108.51	113.93
66	16643	17476	18349	19267	20230	96.02	100.82	105.86	111.16	116.71
67	17060	17913	18808	19749	20736	98.42	103.34	108.51	113.93	119.63
68	17476	18349	19267	20230	21242	100.82	105.86	111.16	116.71	122.55
69	17913	18808	19749	20736	21773	103.34	108.51	113.93	119.63	125.61
70	18349	19267	20230	21242	22304	105.86	111.16	116.71	122.55	128.68
71	18808	19749	20736	21773	22861	108.51	113.93	119.63	125.61	131.89
72	19267	20230	21242	22304	23419	111.16	116.71	122.55	128.68	135.11
73	19749	20736	21773	22861	24004	113.93	119.63	125.61	131.89	138.49
74	20230	21242	22304	23419	24590	116.71	122.55	128.68	135.11	141.87



Appendix IV

Salary Range Placement Recommendations

**Volume II Appendix IV
 Contra Costa County Employees' Retirement Association
 Proposed Range Place Recommendations - Represented
 July 2017**

Class Title	Current Maximum Monthly Salary	% from Total Comp Median	Market Placement	Proposed Salary Range	Proposed Maximum Monthly Salary	Percent Difference	Rationale
Senior Retirement Counselor	\$5,718	5.7%	\$5,392	12	\$5,419	-5.2%	Market and range placement; y-rate
Retirement Counselor	\$4,957			8	\$4,915	-0.8%	Internal Alignment; 10% below Senior Retirement Counselor
Data Technology Specialist	\$6,594			18	\$6,273	-4.9%	Internal Alignment; maintain current alignment 15% above Member Services Specialist; v-rate
Member Services Specialist	\$5,718	6.0%	\$5,375	12	\$5,419	-5.2%	Market and range placement; y-rate
Retirement Services Technician	\$4,989	14.0%	\$4,291	3	\$4,352	-12.8%	Market and range placement; y-rate
Accounting Specialist	\$6,594			18	\$6,273	-4.9%	Internal Alignment; 15% above Accounting Technician; Y-rate
Accounting Technician	\$5,446	1.3%	\$5,375	12	\$5,419	-0.5%	Market and range placement; Y-rate
Administrative Assistant	\$5,538			13	\$5,554	0.3%	Internal Alignment; 20% below Executive Assistant
Office Specialist	\$4,989			1	\$4,145	-16.9%	Internal Alignment; 5% below Retirement Services Technician



Meeting Date
10/25/17
Agenda Item
#7

MEMORANDUM

Date: October 25, 2017

To: Board of Retirement
Gail Strohl, Chief Executive Officer

From: Karen Levy, General Counsel

Subject: State Association of County Retirement Systems 2017 Legislative Proposal

Background

The State Association of County Retirement Systems (SACRS) Legislative Committee is recommending one legislative proposal for SACRS sponsorship for 2017. The proposal will be voted on by the SACRS member systems at the Business Meeting of the SACRS Fall Conference, Friday, November 17, 2017. SACRS member systems may vote to support, oppose, or take no position on the legislative proposals.

The legislative proposal to be considered for SACRS Sponsorship in 2017 is as follows:

Definition of "Surviving Spouse". This proposal would add a provision to the County Employees Retirement Law of 1937 (CERL) defining "surviving spouse" to include only a spouse who is legally married to the member, is neither divorced nor legally separated from the member, and who meets all other requirements of CERL pertaining to the length of the marriage and the spouse's age at the time of the member's death.

The SACRS Legislative Committee recommends that SACRS sponsor this legislation to define "surviving spouse" so retirement systems are not confused by conflicting case law. A recent court case concluded that a legally separated spouse qualified for a survivor continuance as the member's surviving spouse. This opinion is contrary to the practices of at least eight CERL systems and three prior decisions issued by the Superior Court in Santa Barbara, Contra Costa and Ventura counties.

Impact on CCCERA: This proposal would provide CCCERA with clarity regarding whether a legally separated spouse qualifies for a survivor continuance as the member's surviving spouse. The proposal would clarify conflicting case law on this issue.



Note: two other legislative proposals were submitted to the SACRS Legislative Committee, but the Committee has voted not to recommend SACRS sponsorship for these proposals:

1. Legislative proposal requiring a specific statutory time limit of four months in which to file a disability application. The four months would run from the date the applicant knows or should have known that his or her illness or injury has become permanent; and
2. Legislative proposal applying to all twenty CERL system the statute that excludes assistant administrators and chief investment officers from civil service.

Recommendation

Consider and take possible action to direct the CCCERA Board voting delegate to vote in support of the 2017 SACRS legislative proposal at the November 2017 SACRS Conference.

CCCERA Board Meetings 2018

Meeting Date
10/25/17
Agenda Item
#8

January						
Su	Mo	Tu	We	Th	Fr	Sa
	H	2	3	4	5	6
7	8	9	B	11	12	13
14	H	16	17	18	19	20
21	22	23	B	25	26	27
28	29	30	31			

1 - New Year's Day Observed
15 - Martin Luther King Jr. Day

February						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	B	15	16	17
18	H	20	21	22	23	24
25	26	27	B			

19 - Presidents' Day

March						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	C
C	C	C	7	8	9	10
11	12	13	B	15	16	17
18	19	20	21	22	23	24
25	26	27	B	29	30	31

April						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	B	12	13	14
15	16	17	18	19	20	21
22	23	24	B	26	27	28
29	30					

May						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	B	10	11	12
13	14	S	S	S	S	19
20	21	22	B	24	25	26
27	H	29	30	31		

28 - Memorial Day

June						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	B	14	15	16
17	18	19	20	21	22	23
24	25	26	B	28	29	30

July						
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	H	5	6	7
8	9	10	B	12	13	14
15	16	17	18	19	20	21
22	23	24	B	26	27	28
29	30	31				

4 - Independence Day

August						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	B	9	10	11
12	13	14	15	16	17	18
19	20	21	B	23	24	25
26	27	28	29	30	31	

September						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	H	4	5	6	7	8
9	10	11	B	13	14	15
16	17	18	19	20	21	22
23	24	25	B	27	28	29
30						

3 - Labor Day

October						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	B	11	12	13
14	15	16	17	18	19	20
21	22	23	B	25	26	27
28	29	30	31			

November						
Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	B	8	9	10
11	H	S	S	S	S	17
18	19	B	21	H	H	24
25	26	27	28	29	30	

12 - Veterans Day
22 and 23 - Thanksgiving

December						
Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	B	13	14	15
16	17	18	19	20	21	22
23	24	H	26	27	28	29
30	31					

25 - Christmas Day Observed

B Board Meeting

S SACRS

C CALAPRS - General Assembly

CALAPRS

EDUCATION • COMMUNICATION • NETWORKING
California Association of Public Retirement Systems

Meeting Date
10/25/17
Agenda Item
#9a.

TRUSTEES' ROUNDTABLE

Friday, October 27, 2017
Doubletree by Hilton San Jose
2050 Gateway Place, San Jose, CA

AGENDA

- 8:30 am Continental Breakfast**
- 9:00 am Welcome and Introduction**
Anne Casscells, Aetos Capital, LLC
Wolfram Klingler, XTP Implementation Services, LLC
Eyal Bilgal, ThirdAct
- 9:10 am System Updates and Roundtable Discussion of Current Issues**
- 9:30 am Macro Perspective on Fed balance sheet and government actions**
Anne Casscells, Aetos Capital, LLC
- 10:30 am Break**
- 10:45 am Implementation Efficiency and Cost Optimization in Delegated Investment Management.**
Wolfram Klingler, XTP Implementation Services, LLC
- 12:00 pm Lunch**
- 1:15 pm Fintech in Real Estate**
Eyal Bilgal
- 2:15 pm Break**
- 2:30 pm Topic discussion, practical application, next steps.**
Selection of coordinator for the Spring 2018 CALAPRS Roundtable
- 3:30 pm Adjournment**

CONTACT US

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<p><i>Meeting Date</i> 10/25/17 <i>Agenda Item</i> #9b.</p>

Legislative Conference

The NCPERS Legislative Conference is the premier conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today.

Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.



2018 Legislative Conference January 28 - 30 Washington, DC

2018 Call for Proposals/Speakers (<http://www.ncpers.org/files/Conference%20Docs/Legislative%20Conf/2018/Call%20for%20Speakers%202017.pdf>)

Submit your presentation proposal by **Monday, November 20** to be considered for a speaking slot at the 2018 Legislative Conference. Click here (http://www.ncpers.org/files/Conference%20Docs/Annual%20Conference/2018/Call%20for%20Speakers_Sample.pdf) to view a sample submission.

Online Registration (*Opening Soon*)

To register online, please have your login credentials handy. If you have forgotten your login credentials **CLICK HERE** (http://www.ncpers.org/assoc_forgot.asp) to recover this information. If you are new to your organization and do not have an NCPERS membership profile, please send an email to registration@ncpers.org (<mailto:registration@ncpers.org>) or call 202-624-1456.

Hotel Reservations (<https://aws.passkey.com/go/NCPERS2018>)

Book your hotel stay at the Capitol Hilton Hotel (<http://www3.hilton.com/en/hotels/district-of-columbia/capitol-hilton-DCASHHH/index.html>). **Call 1-800-HILTONS and use code NCPE** to receive the discounted room rate. **Reservation deadline is Friday, January 12.**