

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

**PERSONNEL COMMITTEE MEETING
Wednesday, August 20, 2025
9:00 A.M.**

Members of the Committee

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

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

OCERS Zoom Meeting Video/Teleconference Information	
Join Using Zoom App (Video & Audio) https://ocers.zoom.us/j/81129822252 Meeting ID: 811 2982 2252 Passcode: 974562 Go to https://www.zoom.us/download to download Zoom app before meeting. Go to https://zoom.us to connect online using any browser.	Join by Telephone (Audio Only) Dial by your location <ul style="list-style-type: none">• +1 669 900 6833 US (San Jose)• +1 346 248 7799 US (Houston)• +1 253 215 8782 US (Tacoma)• +1 929 436 2866 US (New York)• +1 301 715 8592 US (Washington DC)• +1 312 626 6799 US (Chicago) Meeting ID: 811 2982 2252 Passcode: 974562
A Zoom Meeting Participant Guide is available on OCERS website Board & Committee Meetings Page .	

AGENDA

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

OPEN SESSION

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

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Members of the public who wish to provide comment during the meeting may do so by “raising your hand” in the Zoom app, or if joining by telephone, by pressing * 9 on your telephone keypad.

Members of the public who participate in the meeting from the OCERS Boardroom and who wish to provide comment during the meeting may do so from the podium located in the OCERS Boardroom.

When addressing the Committee, please state your name for the record prior to providing your comments. Speakers will be limited to three (3) minutes.

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

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

CONSENT AGENDA

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

C-1 PERSONNEL COMMITTEE MEETING MINUTES

Personnel Committee Meeting Minutes

June 25, 2025

Recommendation: Approve minutes.

ACTION ITEMS

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

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

A-2 PROPOSED 2026 STAFFING PLAN

Presentation by Steve Delaney, CEO, and Cynthia Hockless, Director of Human Resources, OCERS

Recommendation: Approve and recommend that the Board of Retirement approve the following items related to the 2026 staffing plan to be presented at the October 20, 2025, Board meeting:

Approve the creation of four (4) new career ladders and one (1) new career ladder series:

- A.** Add two (2) career ladders to the Investments Division
- B.** Add one (1) career ladder to the Disability Department
- C.** Add one (1) career ladder to the Human Resources Department
- D.** Add one (1) career ladder series to the Enterprise Project Management Office (EPMO)

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The total estimated annual personnel cost for the creation of these career ladders is **\$77,132.**

INFORMATION ITEMS

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

I-1 UPDATE ON OUTREACH REGARDING EMPLOYER DATA

Presentation by David Kim, Assistant CEO of External Operations, OCERS

COMMITTEE MEMBER COMMENTS

CHIEF EXECUTIVE OFFICER/STAFF COMMENTS

COUNSEL COMMENTS

ADJOURNMENT

NOTICE OF NEXT MEETINGS

GOVERNANCE COMMITTEE MEETING

August 21, 2025

9:30 A.M.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM

2223 E. WELLINGTON AVENUE, SUITE 100

SANTA ANA, CA 92701

INVESTMENT COMMITTEE MEETING

August 27, 2025

9:00 A.M.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM

2223 E. WELLINGTON AVENUE, SUITE 100

SANTA ANA, CA 92701

STRATEGIC PLANNING WORKSHOP

September 9, 2025 – September 10, 2025

8:30 A.M. TO 4:30 P.M.

WESTIN SOUTH COAST PLAZA

686 ANTON BLVD.

COSTA MESA, CA 92626

AVAILABILITY OF AGENDA MATERIALS - Documents and other materials that are non-exempt public records distributed to all or a majority of the members of the OCERS Board or Committee of the Board in

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

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

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

**PERSONNEL COMMITTEE MEETING
Wednesday, June 25, 2025
9:00 A.M.**

MINUTES

OPEN SESSION

Chair Dewane called the meeting to order at 9:02 A.M.

Recording Secretary administered the Roll Call attendance.

Attendance was as follows:

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

Also Present: Steve Delaney, CEO; Brenda Shott, Assistant CEO of Internal Operations; David Kim, Assistant CEO of External Operations; Molly Murphy, Chief Investments Officer; Darren Dang (Zoom), Chief Technology Officer; Cynthia Hockless (Zoom), Director of Human Resources; Mark Adviento, Director of Member & Employer Relations Section - Member Services; Jennifer Reyes, Finance Manager; Will Tsao, Director of EPMO; Jeff Lamberson, Director of Retirement Operations Section - Member Services; Ivan Cao, Staff Attorney; Sarah Abrahamson, HR Analyst; Melissa Wozniuk, HR Analyst; Dena Gunsolley, Manager of Learning and Organizational Development; Amy Lim, LOD Staff Assistant; Chad Takimoto, Sr. Information Technologist; Peter Felix, Audio Visual Technician; Sean Pham, IT Helpdesk Intern; Amanda Evenson, Recording Secretary; Charles Barfield (CB), OCEA; Maggie Williams-Dalgart (Zoom); Gallagher; Sandi Florez (Zoom), County of Orange; Julie Lam (Zoom), County of Orange

CONSENT AGENDA

C-1 PERSONNEL COMMITTEE MEETING MINUTES

Personnel Committee Meeting Minutes

April 2, 2025

Recommendation: Approve minutes.

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

The motion passed **unanimously**.

Orange County Employees Retirement System
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Personnel Committee Meeting

ACTION ITEMS

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

A-2 UPDATE ON MOVING THE WORKFORCE TO BE 100% EMPLOYED BY OCERS AS A SINGLE AGENCY

Presentation by Steve Delaney, CEO, OCERS

Recommendation:

1. Recommend that the Board of Retirement direct Staff to halt the pursuit of legislation to move the County employees to be OCERS direct, and pursue working with the County on making OCERS County Classifications OCERS-specific.
2. Receive and file the Gallagher study.

Mr. Barfield from OCEA presented the results of the staff interest survey regarding the potential transition of County employees to become OCERS direct. Overall, only 38% of County employees expressed support for making the move to OCERS direct, however it was agreed by all that the process of moving County employees to Direct should stop. Mr. Delaney confirmed that the Gallagher study would serve as a starting point for future discussions with the County regarding modifying County employee job descriptions to better match their OCERS duties.

After discussion, a **Motion** was made by Mr. Oates, **seconded** by Mr. Packard, to recommend that the Board of Retirement direct staff to halt the pursuit of legislation to move the County employees to be OCERS direct, pursue working with the County on making OCERS County Classifications OCERS-specific, and to receive and file the Gallagher study.

The motion passed **unanimously**.

A-3 2025 CAREER LADDER – CHIEF INFORMATION SECURITY OFFICER (CISO)

Presentation by Steve Delaney, CEO, and Darren Dang, CTO, OCERS

Recommendation: Approve the Creation of a Career Ladder for a Chief Information Security Officer.

After a presentation from Mr. Delaney, a **Motion** was made by Mr. Hilton, **seconded** by Mr. Packard, to approve the creation of a Career Ladder for a Chief Information Security Officer.

The motion passed **unanimously**.

A-4 TRIENNIAL REVIEW OF THE COMPENSATION POLICY

Presentation by Steve Delaney, CEO, and Ivan Cao, Staff Attorney for Investments, OCERS

Recommendation: Approve and recommend that the Committee adopt the revisions to the Compensation Policy, including incorporating the Incentive Compensation Policy.

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Mr. Cao presented the revisions to the Compensation Policy. Mr. Hilton stated that he would like the Salary Compression Mitigation (Sections 14-20) removed so that it can be reworked by staff.

A **Motion** was made by Mr. Hilton, **seconded** by Mr. Packard, to approve and recommend the revisions to the Compensation Policy, including the Incentive Compensation Policy and Certification Incentive Program, and excluding the proposed revisions to the Salary Compression Mitigation (Sections 14 -20).

The motion passed **unanimously**.

A-5 2025 PENSION ADMINISTRATION SYSTEM (PAS) PROJECT STAFFING PLAN – PHASE II

Presentation by David Kim, Assistant CEO of External Operations, and Cynthia Hockless, Director of Human Resources, OCERS

Recommendation: Approve and recommend to the Board of Retirement the following eight (8) Limited Term position requests for the Disability, Member Services, Finance and Information Technology Departments in preparation for the Pension Administration System (PAS) Implementation, now known as OCERS Horizon:

1. Disability Retirement Program Specialist (1)
2. Member Services Accounting Technician (2)
3. Member Services Retirement Benefits Technician (1)
4. Finance Accountant Auditor (1)
5. Information Technology Business Systems Analyst (1)
6. Information Technology Data Analyst (1)
7. Information Technology AI Automation Engineer (1)

The total estimated annual personnel cost for the proposed staffing changes presented is \$1,133,739. The estimated budget impact for 2025 due to Q4 hiring for several positions is \$97,140; however, staff anticipates the estimated cost for the additional positions in 2025 can be absorbed within the existing 2025 budget.

Mr. Kim and Ms. Hockless presented Phase II of the Pension Administration System (PAS) Project Staffing Plan.

Mr. Hilton expressed concern regarding the pacing of the PAS staffing plan, particularly in relation to the amount of time required to secure a vendor. In response, Mr. Kim reviewed the vendor timeline, which targets having a vendor in place by January 2026 and allows for a three- to six-month training period prior to implementation.

Mr. Packard inquired about the total additional Limited-Term positions and the overall budget impact of the PAS staffing plan. Mr. Kim explained that not all of the Limited Term positions will be filled externally. Of the 22 Limited Term positions approved at the April 2, 2025 Personnel Committee meeting - and subsequently approved at the April 21, 2025 Board meeting - 13 positions would be filled internally while nine (9) would be filled externally. This results in nine (9) additional Limited-Term headcount in 2025.

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The current request before the Personnel Committee is for eight (8) Limited Term positions to be filled externally, resulting in eight (8) additional Limited Term headcount - four (4) in 2025 and four (4) in 2026.

Ms. Shott clarified that the 2025 budget does not require an amendment, as current vacancies within the approved OCERS staffing plan can accommodate the new positions in the current year. The annual cost of the Limited-Term positions will be incorporated into the project budget in future years' budgets.

After discussion, a **Motion** was made by Mr. Oates, **seconded** by Mr. Hilton, to approve and recommend the Board of Retirement approve the eight (8) Limited Term position for the Disability, Member Services, Finance and Information Technology Departments in preparation for the Pension Administration System (PAS) Implementation, known as OCERS Horizon.

The motion passed **unanimously**.

INFORMATION ITEMS

I-1 AGENCY TALENT NEEDS REVIEW PROCESS

Presentation by Cynthia Hockless, Director of Human Resources, Sarah Abrahamson, HR Analyst, and John T. Nguyen, HR Staff Specialist, OCERS

Ms. Abrahamson provided an overview of the new Agency Talent Needs review process designed to help the agency with AI implementation. Mr. Nguyen then outlined the implementation and steps of the new streamlined and standardized process. Mr. Packard recommended reducing the number of required signatures to improve efficiency and suggested adding a timeframe to the DocuSign routing to better respect Senior Executives' time. Chair Dewane thanked the team for improving the efficiency of the process.

Mr. Delaney left the meeting at 10:12 a.m.

I-2 UPDATE ON OUTREACH REGARDING EMPLOYER DATA

Presentation by David Kim, Assistant CEO of External Operations, and Mark Adviento, Director of Member Services, OCERS

Mr. Adviento presented an update on the Employer Data project and reviewed the progress made on the Employer Handbook, as well as the meetings held with the Employers.

COMMITTEE MEMBER/CHIEF EXECUTIVE OFFICER/COUNSEL/STAFF COMMENTS

None.

ADJOURNMENT

Chair Dewane **ADJOURNED** the meeting at 10:19 A.M.

Submitted by:

Submitted by:

Approved by:

Orange County Employees Retirement System
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Personnel Committee Meeting

Cynthia Hockless
Liaison

Steve Delaney
Secretary to the Board

Shawn Dewane
Chair



Memorandum

DATE: August 20, 2025
TO: Members of the Personnel Committee
FROM: Steve Delaney, Chief Executive Officer
SUBJECT: **PROPOSED 2026 STAFFING PLAN**

Recommendation

Approve and recommend that the Board of Retirement approve the following items related to the 2026 staffing plan to be presented at the October 20, 2025, Board meeting:

1. APPROVE THE CREATION OF FOUR (4) NEW CAREER LADDERS AND ONE (1) NEW CAREER LADDER SERIES:

- A. Add two (2) career ladders to the Investments Division
- B. Add one (1) career ladder to the Disability Department
- C. Add one (1) career ladder to the Human Resources Department
- D. Add one (1) career ladder series to the Enterprise Project Management Office (EPMO)

The total estimated annual personnel cost for the creation of these career ladders is **\$77,132**.

Background/Discussion

Each year, I partner with Department Heads to evaluate the staffing plan and identify the talent necessary to support OCERS operations. This year marks the second time I have implemented a more structured and rigorous process for the OCERS Leadership Team to submit requests for new positions or career ladders. Under this enhanced approach, all proposals must be presented and vetted internally before advancing to the Personnel Committee for consideration.

As a result of this refined process, we seek approval to establish four (4) new career ladders and one (1) new career ladder series. **We are not asking to increase the budgeted headcount.**

Career ladders offer a strategic approach to retaining top talent at OCERS without increasing overall headcount. They allow current employees to advance into higher-level roles with expanded responsibilities, supporting organizational growth and individual career development.

Since implementing career ladders, OCERS has achieved an 84% retention rate among employees who have been promoted through this pathway over the past decade.

Below is a summary of the cost of each career ladder, with a detailed description of the request in the attached memos.

A. ADD TWO (2) CAREER LADDERS TO THE INVESTMENTS DIVISION

Position Title	Career Ladder Position	Department	Position Type	Current Salary and Benefits	Proposed Salary and Benefits	Annual Budget Impact
Investment Analyst	Senior Investment Analyst	Investments	OCERS-Direct	\$167,302	\$181,438	\$14,136
Director	Managing Director	Investments	OCERS-Direct	\$426,703	\$443,773	\$17,070

The Investments Department is requesting two career ladders for FY26. The rationale for both requests follow similar themes: 1) organizational maturity; 2) skills need of the organization; 3) skills growth of the individual; and 4) succession planning. OCERS' investment program continues to grow in assets and complexity. The request for the Senior Investment Analyst career ladder is in response to OCERS' need for subject matter expertise in certain asset classes and to the individual growth of OCERS' Investment Analyst to step into a role with more responsibility. The career ladder request for Managing Director is based on OCERS' need to increase its Total Portfolio Approach strategy team and differentiate asset class strategy and total portfolio strategy. Both positions will assist with succession planning across the entire hierarchy of the Investments team.

B. ADD ONE (1) CAREER LADDER TO THE DISABILITY DEPARTMENT

Position Title	Career Ladder Position	Department	Position Type	Current Salary and Benefits	Proposed Salary and Benefits	Annual Budget Impact
Disability Retirement Investigator	Disability Retirement Analyst	Disability	OCERS-Direct	\$137,278	\$151,006	\$13,728

The Disability Retirement Department is requesting the establishment of a career ladder using the existing Staff Analyst classification, to be internally titled Disability Retirement Analyst. This position would create a promotional opportunity for County-classified Disability Retirement Investigators (DRIs) who have reached the top of their salary range, with no current path for advancement. Two of the department's three DRIs are already at the salary cap, creating a significant retention risk. By introducing an OCERS Direct career ladder, this proposal supports long-term continuity, preserves institutional knowledge, and enables more sustainable delegation of supervisory and programmatic responsibilities.

C. ADD ONE (1) CAREER LADDER TO THE HUMAN RESOURCES DEPARTMENT

Position Title	Career Ladder Position	Department	Position Type	Current Salary and Benefits	Proposed Salary and Benefits	Annual Budget Impact
HR Staff Analyst	Sr. HR Staff Analyst	Human Resources	OCERS-Direct	\$205,074	\$225,582	\$20,508

The addition of a Senior Human Resources Analyst will enhance the HR team's capacity by supervising and mentoring HR Analysts and support staff, ensuring their work aligns with HR and agency standards. This role will support the daily oversight of key HR programs such as classification and compensation, payroll, recruitment, leave management, training, and policy development. The Senior Analyst will also identify opportunities for process improvement through data analysis, workflow audits, and collaboration across functions to optimize service delivery and eliminate inefficiencies. Additionally, they will draft and implement operational policies and procedures to promote consistency, compliance, and transparency in HR practices. The position will also serve as the HR lead on cross-departmental projects, including system implementations, organizational restructures, and agency-wide initiatives like the PAS project.

D. ADD ONE (1) CAREER LADDER SERIES TO THE ENTERPRISE PROJECT MANAGEMENT OFFICE (EPMO)

Position Title	Career Ladder Position	Department	Position Type	Current Salary and Benefits	Proposed Salary and Benefits	Annual Budget Impact
Project Assistant	Project Specialist	EPMO	County	\$116,903	\$128,593	\$11,690

The Enterprise Project Management Office (EPMO) is crucial in managing major projects aligned with Vision 2030. As project demands grow, establishing a full career ladder series for the Project Analyst role—from Project Assistant to Project Specialist to a future promotion to a Project Analyst —will enhance organizational project management maturity, support talent development and retention, and boost productivity. This structure will improve scalability, knowledge transfer, and innovation while reducing reliance on contractors. The estimated future cost for the top tier of this series, from Staff Specialist to Staff Analyst, is \$14,000. The proposal seeks approval to create this career path and allocate necessary resources, contributing to a more resilient and cost-effective OCERS.

Conclusion:

I am not proposing an increase in headcount for the 2026 Staffing Plan. I am proposing the creation of four (4) new career ladders and one (1) new career ladder series. The total annual cost for these positions is outlined above, with an estimated increase in personnel expenses of **\$77,132**.

Attachments:

1. Proposed 2026 Staffing Plan – Presentation
2. Investments Org Chart
3. Enterprise Project Management Office (EPMO) Org Chart
4. Disability Org Chart
5. Human Resources Org Chart

Submitted by:



SD - Approved

Steve Delaney
Chief Executive Officer



Proposed 2026 Staffing Plan

PRESENTATION

Steve Delaney
Chief Executive
Officer

Cynthia Hockless
Director of Human
Resources



Why Career Ladders?

At OCERS, we have established internal advancement pathways to support employee growth and retention. Our career ladder exists in multiple departments, providing clear progression opportunities for our talented workforce, which focuses on retention and development.

Clear Paths

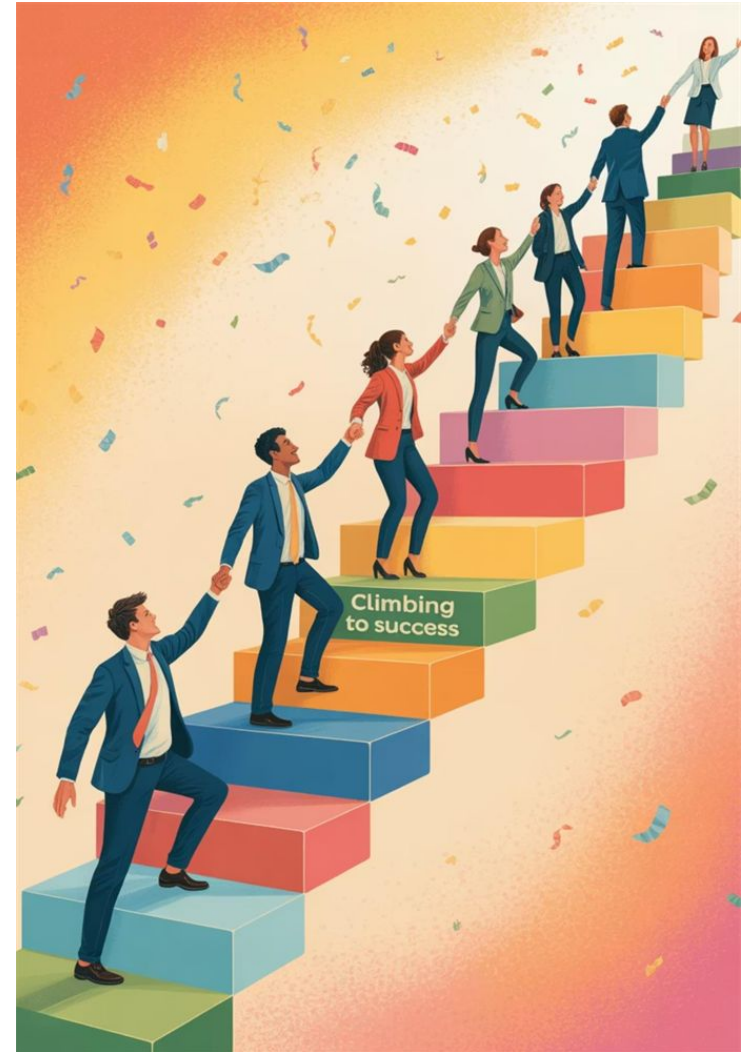
Defined promotional progressions within job series that support retention

Growth Vision

Long-term opportunity visualization for employees

Talent Investment

Strategic workforce planning and internal development as outlined in the Business Plan



OCERS Career Ladder Overview

19

Total Career Ladders

Comprehensive pathways established across departments

14

Career Ladder – 2nd Rung: Advanced Role

Number of employees in 2nd Rung of Career Ladder

84%

Retention Rate

Strong employee retention following implementation

Three separations after promotions in the last **10 years**

	Career Progression	Departure Reason
Employee 1	Attorney → Deputy General Counsel	Accepted position at another retirement system
Employee 2	Investment Analyst → Senior Investment Analyst	Relocated internationally (personal reasons)
Employee 3	Accounting Technician → Accountant/Auditor I	Returned to private sector

Current Career Ladders

Career Ladder Tracker

#	1st Rung	Current Occupant	2nd Rung	Current Occupant
1	Office Specialist	Yes	Staff Assistant	N/A
2	Accounting Technician	N/A	Accountant Auditor I	Yes
3	Accounting Technician	N/A	Accountant Auditor I	Yes
4	Accountant Auditor II	N/A	Sr. Accountant Auditor	Yes
5	Sr. Accountant Auditor	N/A	Finance Analyst	Yes
6	HR Staff Assistant	Yes	Staff Specialist	N/A
7	HR Staff Assistant	Yes	Staff Specialist	N/A
8	HR Staff Assistant	N/A	Staff Specialist	Yes
9	HR Staff Specialist	N/A	Staff Analyst	Yes
10	Internal Auditor	N/A	Sr. Internal Auditor	Yes
11	Information Security Manager	N/A	Sr. Information Security Manager	Yes
12	Director of Information Security	N/A	Chief Information Security Officer	Yes
13	Investment Analyst	N/A	Sr. Investment Analyst	Yes
14	Investment Analyst	N/A	Sr. Investment Analyst	Yes
15	Investment Officer	N/A	Sr. Investment Officer	Yes
16	Investment Officer	Yes	Sr. Investment Officer	N/A
17	Sr. Investment Analyst	N/A	Investment Officer	Yes
18	Paralegal	N/A	Legal Analyst	Yes
19	Staff Attorney	Yes	Deputy General Counsel	N/A



Recommendation:

Approve the creation of four (4) new career ladders and one (1) new career ladder series:

Investments

Two (2) career ladders:

- Managing Director
- Annual Budget Impact - \$17,070
- Sr. Investment Analyst
- Annual budget Impact - \$14,136

Disability

One (1) career ladder:

- Disability Retirement Analyst (Staff Analyst)
- Annual Budget Impact - \$13,728

Human Resources

One (1) career ladder:

- Sr. Human Resources Analyst
- Annual Budget Impact -\$20,508

Enterprise Project Management Office (EPMO)

One (1) career ladder series:

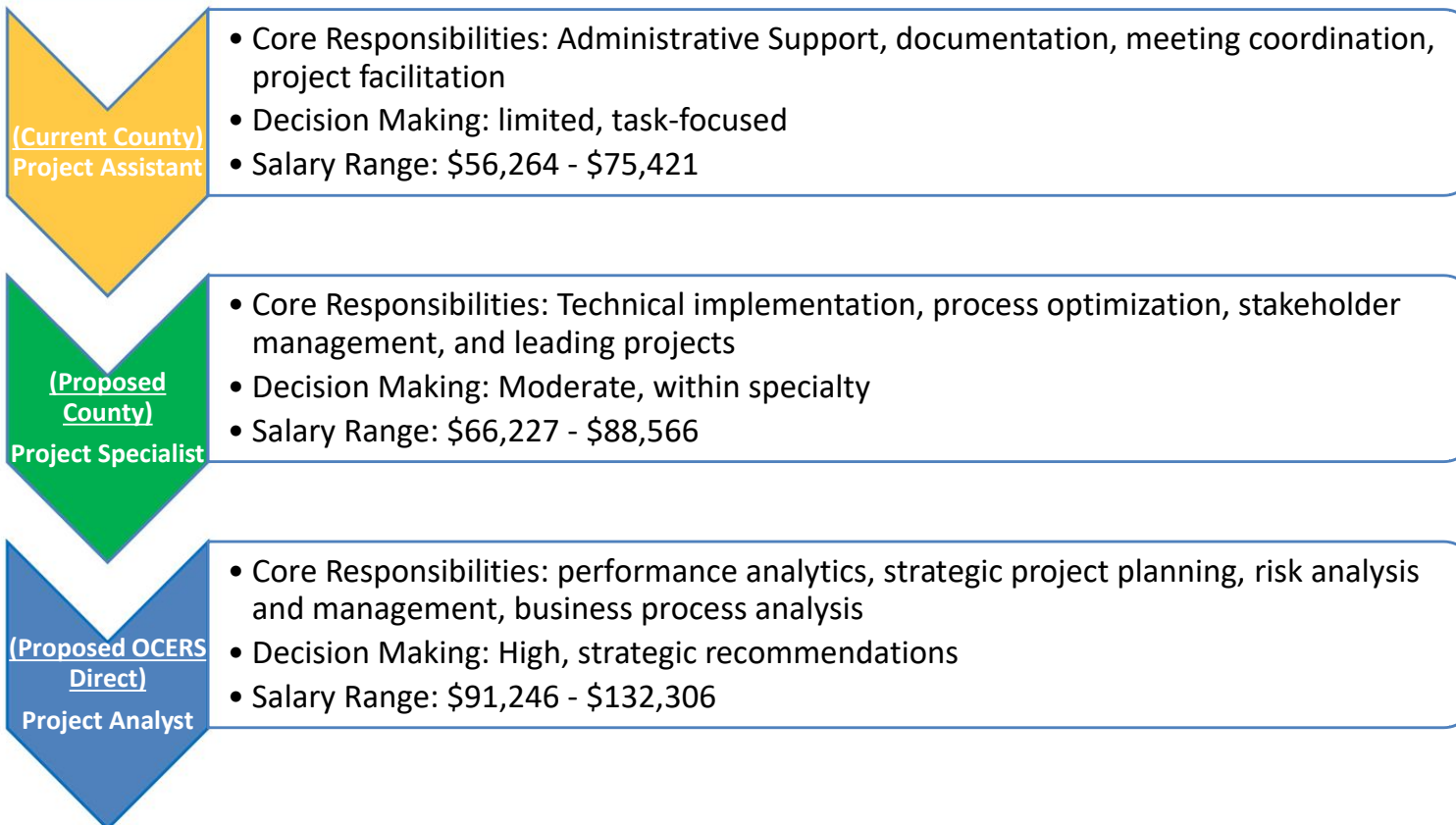
- Project Specialist
- Annual Budget Impact - \$11,690
- Project Analyst
- No current budget Impact

\$77,132

Total 2026 Annual Budget Impact, including salary and benefits



Career Ladder Series: Project Specialist & Project Analyst



Thank you!

Questions?



Appendix

Page 9 – Investment Division Organizational Chart

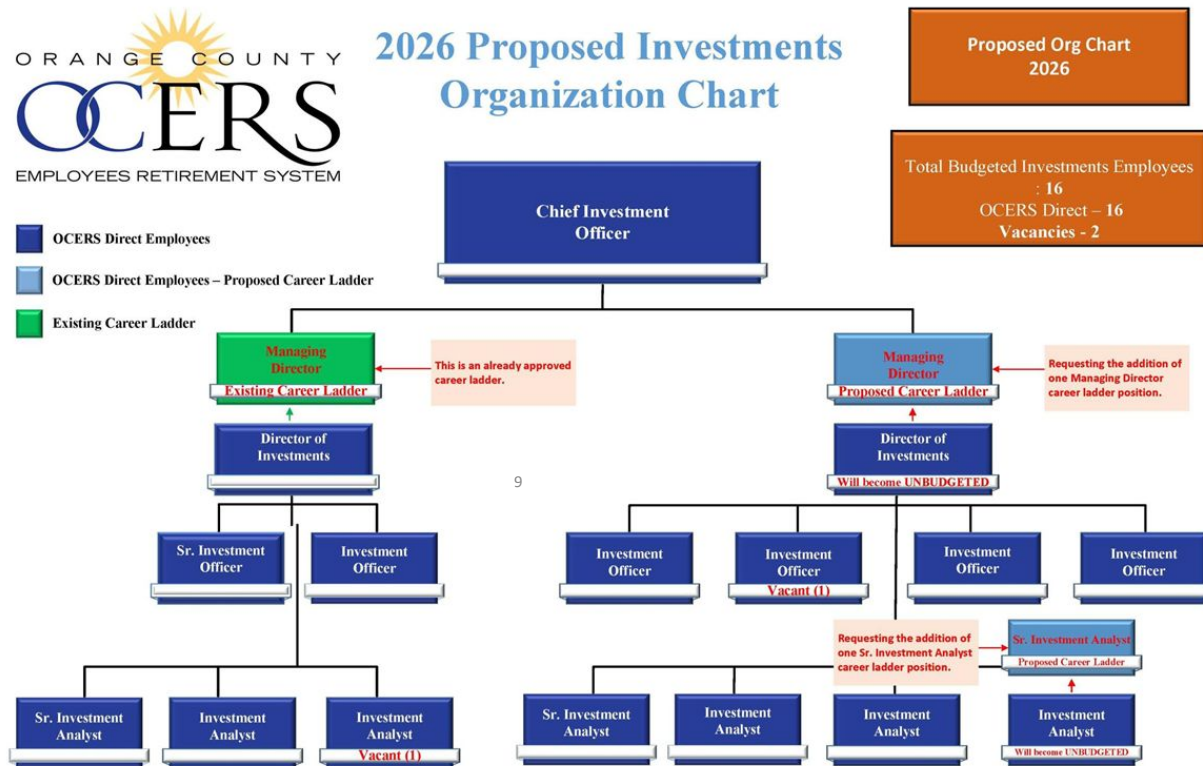
Page 10 – Disability Division Organizational Chart

Page 11 – Human Resources (HR) Organizational Chart

Page 12 – Enterprise Project Management Office (EPMO) Organizational Chart



Organizational Chart



Organizational Chart

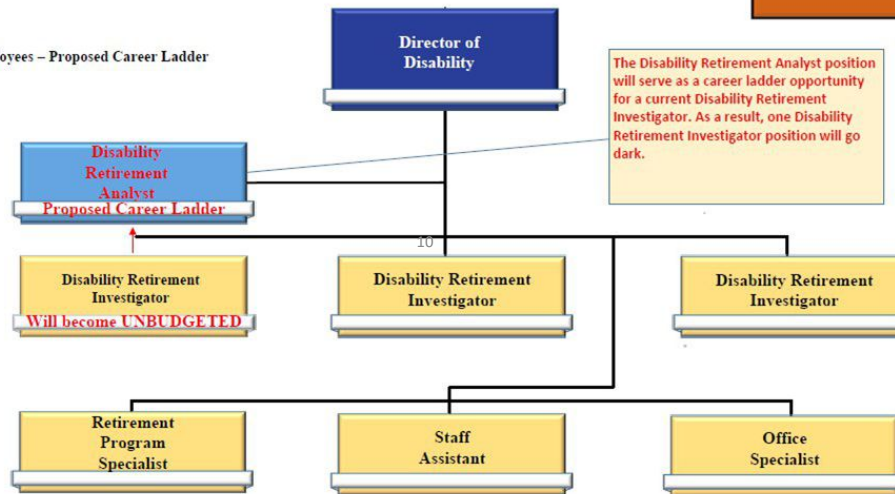


- OCERS Direct Employees
- County Employees
- OCERS Direct Employees – Proposed Career Ladder

2026 Proposed Disability Organization Chart

Proposed 2026 Org Chart

Total Proposed Budgeted Disabilities Employees
2026: 7
County – 5; OCERS Direct – 2



Organizational Chart

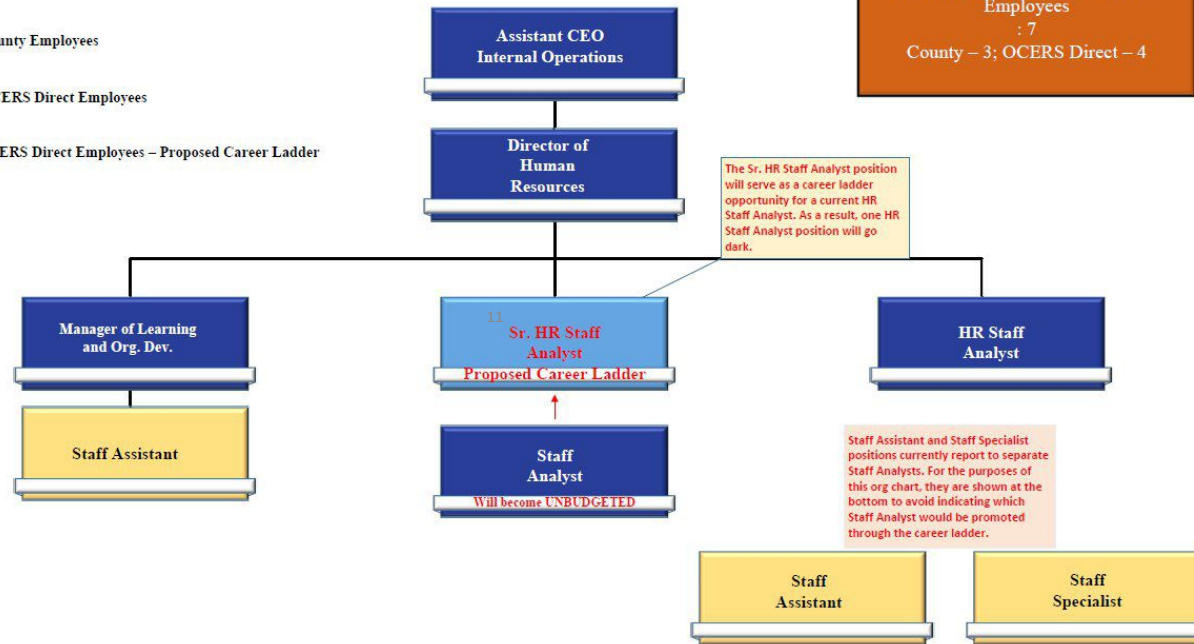


- County Employees
- OCERS Direct Employees
- OCERS Direct Employees – Proposed Career Ladder

2026 Proposed Human Resources Organization Chart

Proposed Org Chart
2026

Total Budgeted Human Resources
Employees
: 7
County – 3; OCERS Direct – 4



Organizational Chart



Proposed 2026 Enterprise Project Management Office Organization Chart

- OCERS Direct Employees
- County Employees
- OCERS Direct Employees – Proposed Career Ladder
- County Employees – Proposed Career Ladder



Proposed Org Chart
2026

Total EPMO Employees
: 2
County – 1; OCERS Direct – 1

- The proposed organizational chart aims to establish two distinct career ladders within the Project Assistant series. The first career ladder supports the current incumbent's progression from the Staff Assistant classification to Staff Specialist.
- Following continued development and strong performance in the Staff Specialist role, the second proposed career ladder—planned for a future phase—would provide a path for advancement from Staff Specialist to Project Analyst.



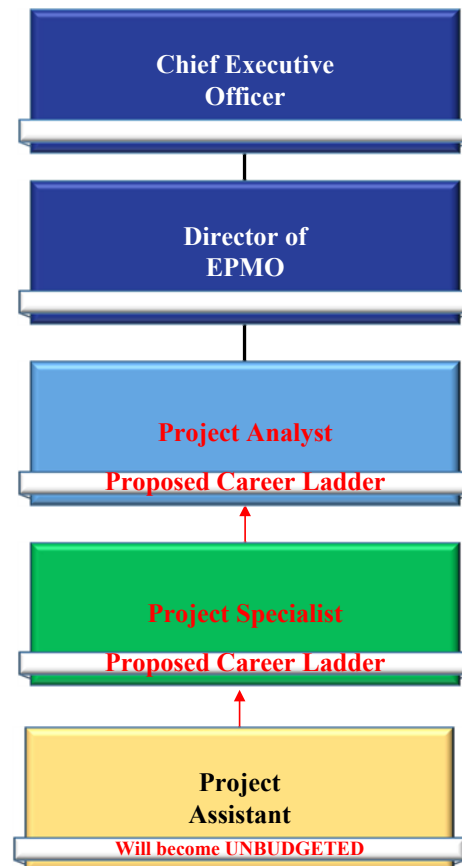
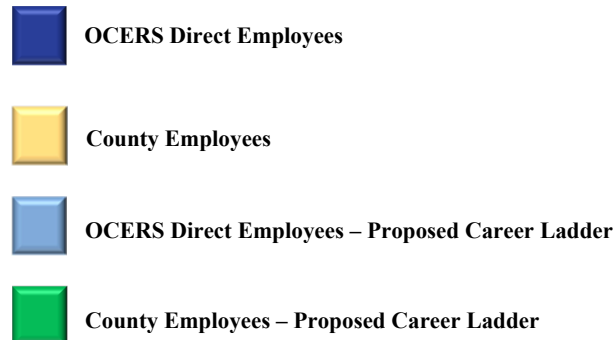
Proposed Org Chart 2026

**Total Budgeted Investments Employees
: 16
OCERS Direct – 16
Vacancies - 2**





Proposed 2026 Enterprise Project Management Office Organization Chart



Proposed Org Chart
2026

Total EPMO Employees
: 2
County – 1; OCERS Direct – 1

- The proposed organizational chart aims to establish two distinct career ladders within the Project Assistant series. The first career ladder supports the current incumbent's progression from the Staff Assistant classification to Staff Specialist.
- Following continued development and strong performance in the Staff Specialist role, the second proposed career ladder—planned for a future phase—would provide a path for advancement from Staff Specialist to Project Analyst.

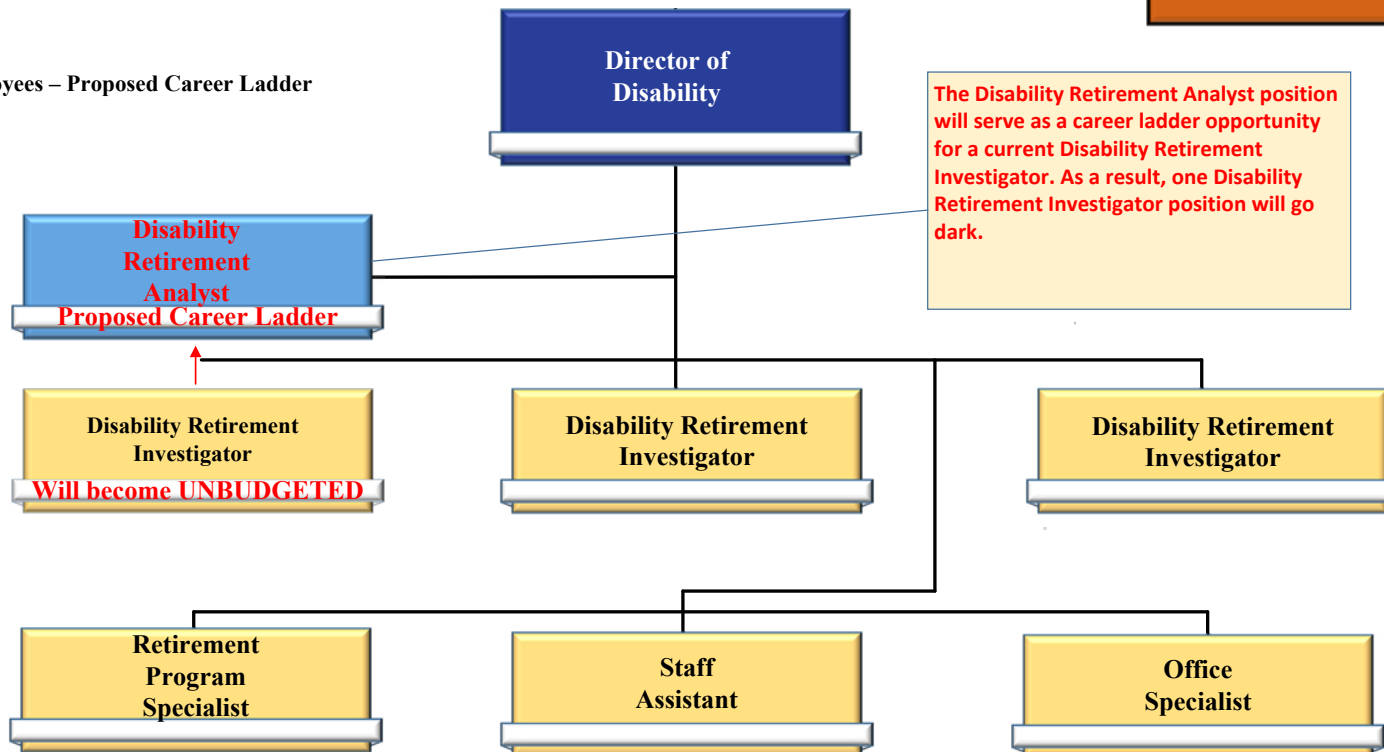


- OCERS Direct Employees
- County Employees
- OCERS Direct Employees – Proposed Career Ladder

2026 Proposed Disability Organization Chart




Proposed 2026 Org Chart

Total Proposed Budgeted Disabilities Employees
2026: 7
County – 5; OCERS Direct – 2



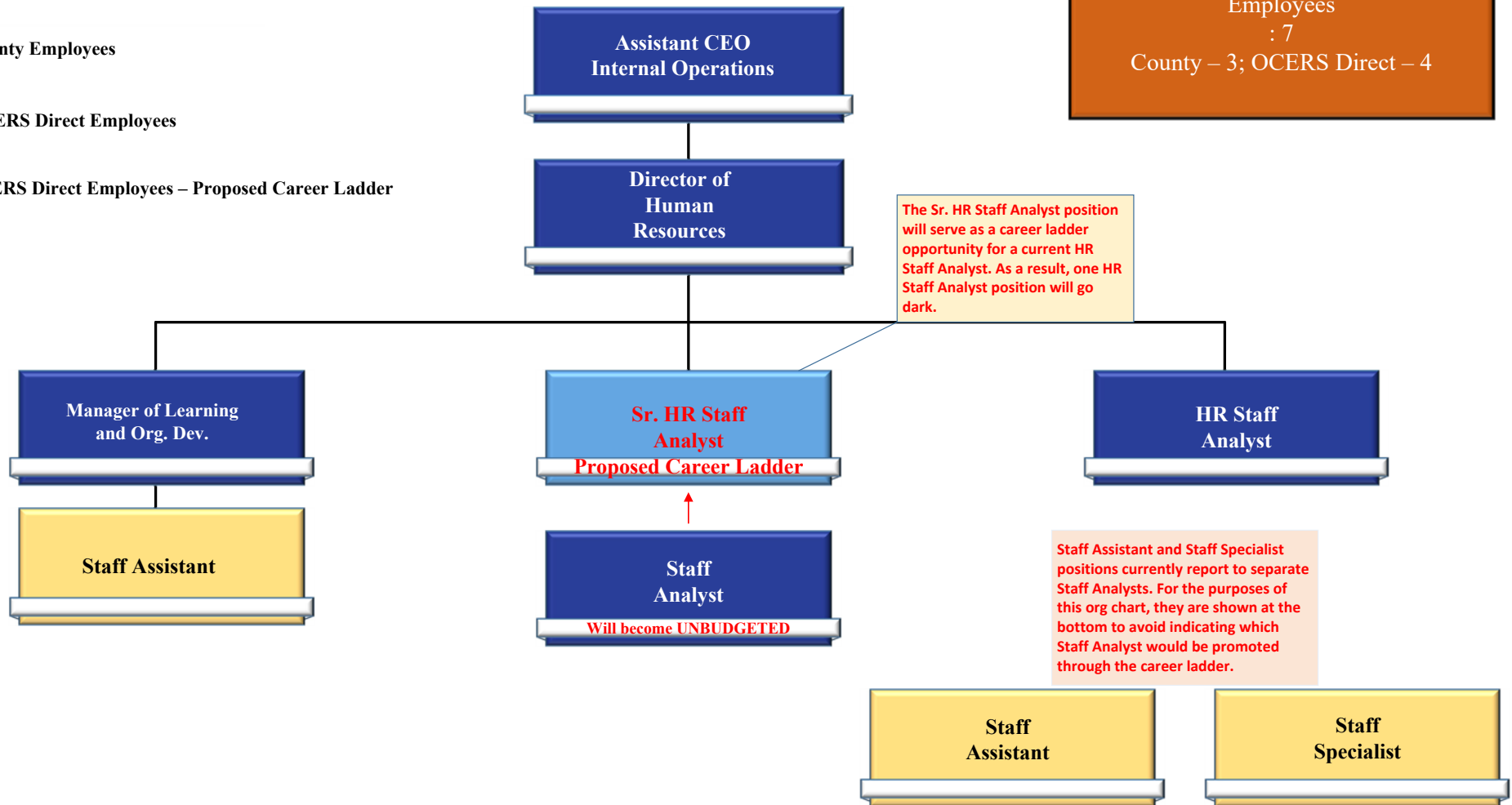


2026 Proposed Human Resources Organization Chart

-  County Employees
-  OCERS Direct Employees
-  OCERS Direct Employees – Proposed Career Ladder

Proposed Org Chart 2026

Total Budgeted Human Resources
Employees
: 7
County – 3; OCERS Direct – 4





Memorandum

DATE: August 20, 2025
TO: Members of the Personnel Committee
FROM: Mark Adviento, Director of Member & Employer Relations Section – Member Services, and
David Kim, Assistant CEO, External Operations
SUBJECT: UPDATE ON OUTREACH REGARDING EMPLOYER DATA

Background/Discussion

This item provides an update on OCERS' continued efforts to obtain complete and accurate data from Employers, as directed by the Board of Retirement.

On August 26, 2025, OCERS will host a **Quarterly All Employer Meeting** with representatives from participating employers. At this meeting, OCERS will present an updated draft of the *Employer Handbook*, intended to support the broader Data Policy.

The meeting will also address enhancements to payroll transmittals, including a new approach to reporting pensionable paid time off and pensionable holiday compensation in transmittal files. These updates will support the automation of benefit calculations in the upcoming Pension Administration System (PAS) and include interim improvements to automate current benefit calculations. The goal of these enhancements is to reduce manual processing and promote long-term operational efficiency.

OCERS continues to underscore the cost and administrative impact of incomplete data, such as when retirement benefits must be calculated manually. These conversations are improving employer awareness and engagement.

To foster support and progress, OCERS Employer Payroll team has continued one-on-one meetings with Employers, recently:

The County of Orange – three meetings in July

Orange County Superior Court – July 8th

Orange County Transportation Authority – August 5th

Transportation Corridor Agency – August 13th

These meetings include employer-specific assessments and technical guidance aimed at improving payroll transmittal processes to support automated benefit calculations in PAS, as discussed earlier. One meeting listed above included joint participation by OCERS and County of Orange IT teams to discuss data sharing and systems integration.

Additional one-on-one meetings with remaining employers are scheduled through October 2025.

Submitted by:



MA - Approved

Mark Adviento
Director of Member and Employer Relations Section
Member Services



DK - Approved

David Kim
Assistant CEO, External Operations