

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

**PERSONNEL COMMITTEE MEETING  
Wednesday, June 25, 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	
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A <a href="#">Zoom Meeting Participant Guide</a> is available on OCERS website <a href="#">Board &amp; Committee Meetings Page</a> .	

**AGENDA**

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

**OPEN SESSION**

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

Orange County Employees Retirement System  
June 25, 2025  
Personnel Committee Meeting – Agenda

Page 2

**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

April 2, 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 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.

Orange County Employees Retirement System  
June 25, 2025  
Personnel Committee Meeting – Agenda

Page 3

**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.

**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.

**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, or 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 these staffing changes is \$1,133,739. The estimated budget impact for 2025 due to Q4 hiring for several positions is \$97,140; however, we anticipate the estimated cost for the additional positions in 2025 can be absorbed within the existing 2025 budget.

**INFORMATION ITEMS**

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

**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*

**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*

Orange County Employees Retirement System  
June 25, 2025  
Personnel Committee Meeting – Agenda

Page 4

**COMMITTEE MEMBER COMMENTS**

**CHIEF EXECUTIVE OFFICER/STAFF COMMENTS**

**COUNSEL COMMENTS**

**ADJOURNMENT**

**NOTICE OF NEXT MEETINGS**

**DISABILITY COMMITTEE MEETING**

**July 21, 2025  
8:30 A.M.**

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

**REGULAR BOARD MEETING**

**July 21, 2025  
9:30 A.M.**

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

**BUILDING COMMITTEE MEETING**

**July 30, 2025  
9:30 A.M.**

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

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

It is OCERS' intention to comply with the Americans with Disabilities Act ("ADA") in all respects. If, as an attendee or participant at this meeting, you will need any special assistance beyond that normally provided, OCERS will attempt to accommodate your needs in a reasonable manner. Please contact

Orange County Employees Retirement System  
June 25, 2025  
Personnel Committee Meeting – Agenda

Page 5

OCERS via email at [adminsupport@ocers.org](mailto: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, April 2, 2025  
2:00 P.M.**

**MINUTES**

**OPEN SESSION**

Chair Dewane called the meeting to order at 2:10 P.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: Iriss Barriga, Board Member; Steve Delaney, CEO; Brenda Shott, Assistant CEO of Internal Operations; David Kim, Assistant CEO of External Operations; Manuel Serpa, General Counsel; Cynthia Hockless, Director of Human Resources; Tracy Bowman, Director of Finance; Sarah Abrahamson, HR Analyst; Melissa Wozniuk, HR Analyst; Dena Gunsolley, Manager of Learning and Organizational Development; Anthony Beltran, Audio Visual Technician; Amanda Evenson, Recording Secretary; Elena Sandoval, Interim Staff Assistant; Adrienne Gordon, Interim Disability Retirement Investigator; Marisa Huskey, Interim Disability Retirement Investigator; Sandi Florez (Zoom), County of Orange

**CONSENT AGENDA**

**C-1 PERSONNEL COMMITTEE MEETING MINUTES**

Personnel Committee Meeting Minutes

October 8, 2024

**Recommendation:** Approve minutes.

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

The motion passed **unanimously**.

**ACTION ITEMS**

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

Orange County Employees Retirement System  
April 2, 2025  
Personnel Committee Meeting

**A-2 PENSION ADMINISTRATION SYSTEM (PAS) PROJECT TEMPORARY STAFFING REQUEST**

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

**Recommendation:** Approve and recommend to the Board of Retirement the following 22 Limited Term requests to the Member Services and Disability Departments in preparation for the PAS implementation:

1. Member Services Manager position (1)
2. Member Services Supervisor positions (3)
3. Senior Retirement Program Specialist positions (4)
4. Retirement Program Investigator (8)
5. Accounting Technician (5)
6. Disability Retirement Specialist (1)

The total estimated annual personnel cost for these staffing changes is **\$1,098,257**. The estimated budget impact for 2025 due to mid-year hiring for several positions is **\$637,130**. There may be requests from other departments, which will then be brought to the Personnel Committee for approval.

Mr. Kim and Ms. Hockless presented the new Pension Administration System (PAS) project initial temporary staffing needs, as well as the employee cycle workflow, the 2025 budgeted headcount, employment types, and the estimated budget impact. The total estimated personnel cost for the Limited Term positions will be absorbed into the current approved budget and have no impact on the 2025 annualized budget at this time. However, OCERS will come back for a requested budget amendment if circumstances change. Mr. Delaney added that in fact other departments will also most likely need Subject Matter Experts pulled off their daily work, leading to additional Limited Term requests, but those would come later in the project. Mr. Hilton thanked Mr. Delaney for adding that to the record, as he had wondered if that could be the case.

After discussion, a **Motion** by Mr. Packard, **seconded** by Mr. Hilton, to approve and recommend the Board of Retirement the following 22 Limited Term requests to the Member Services and Disability Departments in preparation for the PAS implementation.

The motion passed **unanimously**.

**INFORMATION ITEMS**

**I-1 REVIEW OF PERSONNEL COMMITTEE CHARTER**

*Presentation Cynthia Hockless, Director of Human Resources, OCERS*

Ms. Hockless presented the Personnel Committee Charter and reviewed the key duties and responsibilities.

**CHIEF EXECUTIVE OFFICER**

Mr. Delaney thanked Sandi Florez from the County of Orange for joining the meeting.

Orange County Employees Retirement System  
April 2, 2025  
Personnel Committee Meeting

**COMMITTEE MEMBER/COUNSEL/STAFF COMMENTS**

None.

**ADJOURNMENT**

Chair Hilton **ADJOURNED** the meeting at 2:40 P.M.

Submitted by:

Submitted by:

Approved by:

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Cynthia Hockless  
Liaison

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Steve Delaney  
Secretary to the Board

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Shawn Dewane  
Chair





## Memorandum

**DATE:** June 25, 2025  
**TO:** Members of the Personnel Committee  
**FROM:** Steve Delaney, Chief Executive Officer, OCERS  
**SUBJECT:** UPDATE ON MOVING THE WORKFORCE TO BE 100% EMPLOYED BY OCERS AS A SINGLE AGENCY

### Recommendation

- 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.
- Receive and file the Gallagher study.

### Background/Discussion

The OCERS Business Plan includes an initiative to explore employing all OCERS staff directly. In March 2023, Gallagher began a classification study of County positions assigned to OCERS, followed by a compensation study in April 2024. This effort aimed to develop a classification and pay structure that reflects OCERS' specific roles and responsibilities. Updates on the study were presented at multiple Personnel Committee meetings throughout 2024.

Gallagher presented its final findings on August 27, 2024. At that time, the Committee recommended postponing any action until benefit comparisons were completed—this is now included in the attached report.

On April 22, 2025, the Orange County Employees Association (OCEA) conducted a survey to assess County employees' interest in transitioning to direct employment under OCERS. Charles Barfield, OCEA General Manager, is scheduled to present the survey results at the June 25, 2025, Personnel Committee meeting.

At that meeting, staff will recommend halting efforts to pursue legislation for this transition. Instead, they will propose collaborating with the County of Orange to develop OCERS-specific classifications as appropriate, potentially utilizing the findings from the 2024 Gallagher Compensation Study.

### Attachment

1. Timeline of the County to OCERS Direct Initiative
2. Classification and Compensation Study Benefits Report from Gallagher

### Submitted by:



**SD - Approved**

Steve Delaney  
 Chief Executive Officer

## Timeline of Events: Moving the Workforce to Be 100% Employed by OCERS As A Single Agency



April 2025

# COMPENSATION STUDY: ADDENDUM REPORT

Orange County Employees Retirement System



**Gallagher**

Insurance | Risk Management | Consulting

Formerly Koff & Associates

Contents

Summary .....2

    Background .....2

Study Methodology .....2

    Comparator Agencies .....2

    Salary and Benefits Data .....3

    Data Collection .....4

Market Compensation Findings .....5

    Base Salary and Total Compensation Results .....5

    Benefits Offerings .....7

Compensation Plan Design.....9

    Base Salary Versus Total Compensation .....9

Using the Market Data as a Tool.....10

List of Tables

Table 1. Benchmark Classification .....3

Table 2. Market Total Compensation Results .....6

Table 3. Retirement Contributions .....7

Table 4. Monthly Employer Health Contributions .....8

Table 5. Annual Vacation Accruals .....9

Appendices

- Appendix I: Results Summary
- Appendix II: Market Compensation Findings
- Appendix III: Additional Benefits

## Summary

### Background

In 2024 Gallagher conducted a Classification and Compensation study on behalf of the Orange County Employees Retirement System (OCERS). This study focused on positions within OCERS that are also affiliated with the County of Orange. The primary purpose of the study was to assess the work performed by these employees and for Gallagher to offer recommendations for a classification design, as well as compensation recommendation should OCERS wish for all staff to become "direct hires" of the agency. Both phases of the study were concluded with a final report submitted to OCERS in August 2024, presenting findings and recommendations for classification design and salary compensation setting.

The salary recommendations were based on a market study of base salary only. Following a review of the base salary results, OCERS determined that a more comprehensive analysis was warranted, including a review of benefits offerings. In December 2024 Gallagher was engaged to conduct a supplemental survey, to examine total compensation, which includes data on health benefits, retirement, paid leaves, and related benefits. This data, when coupled with the base salary data, is reported as total compensation.

This report serves as a supplement to the August 2024 report submitted to OCERS, which detailed the classification study analysis, findings, and base salary study information. While this report includes some content from the August report, the primary focus is to present the results of the total compensation survey, including methodology, analysis, and findings.

The results of the total compensation survey indicate:

- OCERS' **base salaries**, overall, in comparison to the market median are **6.9% below market**.
- OCERS' **total compensation**, overall, in comparison to the market median is **6.8% below market**.

The results indicate there is no difference between OCERS' competitive position when examining base pay versus total compensation; OCERS neither gains or loses market competitiveness when considering the full benefits package.

Gallagher considers a classification falling within 5% of market median to be competitive with the market.

## Study Methodology

### Comparator Agencies

To maintain continuity with the initial survey, Gallagher used the same comparison agencies as were used previously. These agencies represent a mix of cities, counties, and retirement systems, providing a broad representation of the local and regional labor markets, as well as agencies for which OCERS competes for talent. The following agencies were surveyed in this supplemental process:

- California Public Employees Retirement System
- California State Teachers' Retirement System

- City of Orange
- City of Santa Ana
- County of Orange
- Los Angeles City Employees' Retirement System
- Los Angeles County Employees' Retirement Association
- Los Angeles Fire and Police Pension
- San Bernardino County Employees' Retirement Association
- San Diego City Employees' Retirement System
- San Diego County Employees Retirement Association

### Salary and Benefits Data

Since there was a lag in time from when the initial survey was conducted to this supplemental total compensation survey, Gallagher updated the base salary survey to ensure the most recent salary data was reported along with the benefits. The same nineteen (19) benchmark classifications used previously were surveyed and are included in the table below.

**Table 1. Benchmark Classifications**

OCERS Job Title	
Accountant	Accounting Specialist
Accounting Technician	Administrative Assistant
Disability Retirement Analyst II	Executive Assistant
Human Resources Technician	Information Technology Supervisor
Information Technology Technician II	Infrastructure Engineer II
Office Assistant	Retirement Services Specialist II
Retirement Services Supervisor	Retirement Services Technician I
Senior Software Engineer	Software Engineer
Staff Specialist	Support Services Assistant
Training Specialist	

Prior to launching the study Gallagher consulted with OCERS staff regarding the specific benefit data to be collected and analyzed. The following salary and benefits data was collected for each benchmark classification and the value was then and reported as part of total compensation.

- **Monthly Base Salary.** The top of the salary range and/or control point was reported. All figures are presented in monthly values.
- **Retirement.** The retirement benefit is a significant benefit offered by the employer and most all public employers offer pension benefits. The service retirement formula for each agency's PEPPRA

level or equivalent plan was reported. For agencies with retirement systems established under the County Employees Retirement Law of 1937 ("37 Act"), the reported retirement formula reflect the equivalent PERS formula for purposes of comparison. The following data was also reported:

- Employee Cost Sharing: The contribution an employee makes, above the employee's normal or statutory contribution and which is part of the employer's rate, was reported (these are not common).
- Employer Normal Cost: The employer normal cost, which is the portion of the pension cost that the employer is responsible for paying and represents the ongoing cost of funding the pension benefits, was reported.
- Social Security: Additionally, if an employer participates in Social Security, the employer contribution of 6.2% of the base salary up to the federally-determined maximum contribution for 2025 of \$909.85 per month was reported.
- **Deferred Compensation.** Deferred compensation contributions provided to all employees of a classification, with or without requiring the employee to make a contribution, was reported.
- **Health Insurances.** The employer paid premiums for an employee with family coverage was reported and include medical/cafeteria, dental, vision, and other comparable health insurance offerings.
- **Leaves.** Other than sick leave, which is usage-based, the number of hours off for which the employer provides leave benefit was converted 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 that is offered to employees in the group or unit.
- **Other Benefits.** Any additional benefits not captured above available to all in the classes in the unit was reported.

All of the reported 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

The base salary data was originally collected in March 2024, however, the salaries for the comparator agencies were updated in December 2024/January 2025 in conjunction with the benefits data collection. The data were collected through comparator agency websites, conversations with human resources, accounting, and/or finance personnel, and careful review of agency documentation such as memoranda of understanding, salary tables, personnel manuals, annual reports, actuarial valuations, benefit summaries, and related documents.



The data collection and review process is a critical step in ensuring the validity of the data and the overall credibility of the results. Gallagher relied on the OCERS classification descriptions as the foundation for making the job matching comparison. When examining possible matches, Gallagher does not match based upon job titles, which can often be misleading, but rather analyzes class descriptions before a comparable match is determined. The matching methodology includes an analysis of each class description and the whole position by evaluating a number of factors, including job duties and functions, levels within a class series, reporting structure and organizational relationships, minimum qualification standards, the scope and complexity of the work, decision making authority, budget and administrative responsibilities, consequences of actions, contacts with others, and working conditions. For a match to be deemed valid, Gallagher requires that a classification's "likeness" be at approximately 70% of OCERS benchmark classification.

When an appropriate match is not identified, Gallagher often uses a "hybrid" approach and may include a *functional hybrid* or a *span of responsibility hybrid*. A *functional hybrid* means that the job of one classification at OCERS is performed by two or more classifications at a comparator agency. A *span of responsibility hybrid* is used when the comparator agency has one class that is "bigger" in scope and responsibility and one class that is "smaller," and where the OCERS job class falls in the middle.

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

## Market Compensation Findings

### Base Salary and Total Compensation Results

The results from the market survey are reported and both base salary and total compensation. The *mean* (average) and *median* (midpoint) of the comparator agencies are reported. The *mean* is the sum of the comparator agencies' salaries/total compensation divided by the number of matches, whereas the *median* is the midpoint of all data, with 50% of data points below and 50% of data points above. OCERS data is represented as a percentage above or below the market mean and median. When analyzing the market results, Gallagher recommends the median over the mean, as the mean can be skewed by extremely high or low salary values.

Gallagher requires a minimum of four (4) comparator agencies with matching job classifications to the OCERS benchmark classification for the data to be reported. 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 all of the benchmark classifications. The detailed market data for each benchmark classification is provided in Appendix II and includes two worksheets for each benchmark classification:

- Total Compensation (top monthly salary + value of benefits)
- Benefit Detail (reported in monthly values)

The following table represents a summary of the market base salary and total compensation (base salary plus benefits) findings. For each benchmark classification, the number of matches (agencies with a comparable position) and percentage of OCERS is above or below the market is represented. The table is sorted in descending order from the most positive percentile (above market) to the most negative (below market) in base salary. A classification falling within 5% of the median is considered to be competitive in the



labor market for survey purposes due to the differences in compensation policy, actual scope of work, and position requirements.

**Table 2. Market Total Compensation Results**

Classification Title	Base Salary % Above or Below	Total Compensation % Above or Below
IT Technician II	12.2%	7.6%
Staff Specialist	5.5%	2.4%
Executive Assistant	1.8%	3.4%
Software Engineer	0.0%	-1.1%
Senior Software Engineer	0.0%	-4.7%
Infrastructure Engineer II	-3.7%	-4.1%
Accounting Technician	-5.4%	-2.6%
Accountant	-9.2%	-9.1%
Support Services Assistant	-10.3%	-8.7%
Office Assistant	-11.3%	-7.0%
Training Specialist	-12.1%	-12.2%
Disability Retirement Analyst II	-21.8%	-15.2%
Retirement Services Specialist II	-17.4%	-21.4%
Retirement Services Supervisor	-24.9%	-22.7%
Administrative Assistant	Proposed	Proposed
Accounting Specialist	Proposed	Proposed
Human Resources Technician	Proposed	Proposed
Information Technology Supervisor	Proposed	Proposed
Retirement Services Technician	Proposed	Proposed

Total market results for total compensation show that 12 classifications are paid below the market median, and four (4) classifications are paid above the market median.

# of Classifications	<5%	5-10%	10-20%	20%+	Total
Below the Market Median	4	3	2	2	11
Above the Market Median	2	1	0	0	3

The differences between market-based salaries and total compensation show that OCERS' benefits package does not significantly influence the agency's market position when looking at total compensation.

On average, OCERS' classifications are 6.9% below the market median for base salaries, while that figure changes to 6.8% below the market median for total compensation, which is effectively no difference when benefits are taken into account.

## Benefits Offerings

Following is a summary of the key benefits offered by OCERS and its competitors, including retirement, health insurance contributions, and paid leaves (vacation/paid time off).

**Retirement:** All comparators provide pension contributions on behalf of their employees to 1937 Act systems, CalPERS, or other similar retirement systems as indicated in the chart below. Data was collected for additional retirement-related benefits, including any deferred compensation plans and Social Security participation. Four of the agencies contribute to a deferred compensation account in addition to offering a pension benefit, similar to OCERS, while two agencies participate in Social Security. Also reported are the Employer Normal Cost rate for benefits equivalent to the PEPRA level, as well as the Employee Contribution for that same level of benefit.

**Table 3. Retirement Plans and Contributions**

Agency	System	Formula	Employer Normal Cost	Employee Contribution	Deferred Comp Contribution	Social Security
<b>OCERS</b>	<b>OCERS</b>	<b>1.62%@65</b>	<b>7.29%</b>	<b>6.7%</b>	<b>2%</b>	<b>No</b>
CalPERS	CalPERS	2%@62	8.31%	8%	N/A	6.2%
CalSTRS	CalSTRS	2%@62	8.31%	8%	N/A	6.2%
City of Orange	CalPERS	2%@62	7.93%	7.75%	3%	No
City of Santa Ana	CalPERS	2%@62	7.81%	7.75%	N/A	No
County of Orange	OCERS	1.62%@65	7.29%	6.7%	2%	No
LA County Employees Retirement Association	LACERA	2.3%@65	9.24%	9.24%	4%	No
LA City Employees Retirement Association	LACERS	2%@63	5.4%	7%	N/A	No
LA Fire & Police Pensions	LACERS	2%@63	5.4%	7%	N/A	No
San Bernardino County ERA	SBCERA	2.5%@67	7.21%	7.21%	1%-8.5% <sup>1</sup>	No
San Diego County ERA	SDCERA	1.62%@65	7.35%	7.35%	N/A	No
San Diego City ERS	SDCERS	2.6%@65	12.16%	10.82%	N/A	No

1- For SEIU members, employer contributes up to 1% to a 457b account. For Unrepresented employees, employer contributes 6.5% (.5% to a 457b and 6% to a 401k). For the Executive Assistant only, employer contributes .5% to 457b and 8% to a 401k)

**Health Insurance:** Market data indicate that the average monthly employer contribution toward health insurance premiums is \$2,172, excluding OCERS data. The current 2025 contribution for OCERS of \$2,105 is \$67 less than, or 3% below, the market average. The following table provides the employer costs for medical, dental and vision coverage. Where data for more than one bargaining unit was collected, the average for all units for that comparator agency was reported.

While the employer contribution is an important element to measure as it represents a cost to the employer, the data below does not reflect the employee's contribution or share of the benefit. Additional data on employee contributions for medical (at the family level) are provided in Appendix III, Additional Benefits.

**Table 4. Monthly Employer Health Insurance Contributions**

Agency	Monthly Contribution
Los Angeles County Employee Retirement Association	\$2,431
Los Angeles City Employee Retirement System	\$2,352
Los Angeles Fire & Police Pensions	\$2,352
California Public Employees Retirement System	\$2,278
California State Teachers Retirement System	\$2,278
City of Santa Ana	\$2,180
City of Orange	\$2,112
<b>Orange County Employee Retirement System</b>	<b>\$2,105</b>
County of Orange	\$2,105
San Diego City Employee Retirement System	\$2,042
San Diego County Employee Retirement Association	\$1,990
San Bernardino County Employee Retirement Association	\$1,769
<b>Average</b>	<b>\$2,172</b>

**Vacation Accruals:** Vacation benefits are generally provided in terms of tiers, based on employees' years of services with the agency, with vacation benefit accruals increasing with greater years of service. When comparing the tier level benefits, which are reported at 6 years, 11 years, and 21 years, OCERS is below the market average for vacation benefits at 6 years, is above the market at 11 years, and below at 21 years. Of the benefits offered, 9 agencies offer a higher vacation accrual at 21 years versus 11 years, while OCERS offers the same vacation accrual at 11 years and 21 years. The chart below provides a comparison of OCERS vacation benefits to the market. In addition to the chart below, Appendix III provides data on accrual rates at additional tier levels.

**Table 5. Annual Vacation Accruals**

Agency	Year 6	Year 11	Year 21
<b>Orange County Employee Retirement System</b>	<b>120</b>	<b>160</b>	<b>160</b>
California Public Employees Retirement System	123	147	171
California State Teachers Retirement System	123	147	171
City of Orange	134	148	184
City of Santa Ana	124	144	200
County of Orange	120	160	160
Los Angeles County Employees Retirement Association	136	136	192
Los Angeles City Employees Retirement Association	136	136	192
Los Angeles Fire & Police Pensions	136	136	192
San Bernardino County Employees Retirement Association	120	160	160
San Diego County Employee Retirement Association	125	125	165
San Diego City Employee Retirement System	176	176	216
Average	132	147	182

## Compensation Plan Design

### Base Salary Versus Total Compensation

The salary recommendations provided to OCERS in August 2024 were based on examination of OCERS' market competitiveness relative to base salary only. When total compensation is studied, organizations may also consider the relative competitiveness, such that benefits offerings are also taken into account when making salary strategies. This is often recommended when there is a meaningful impact on competitiveness when considering total compensation. Based on the results of the total compensation survey, which indicate that OCERS benefits are generally consistent with the market, it is recommended salary decision be based on results from the base salary survey.

The August 2024 report also included a recommendation for a salary design and a proposed rate of pay for each of the job classes included in the study. Gallagher reexamined the data provided at that time to determine if any revisions to the initial recommendations are necessary; no changes to those initial salary setting recommendations are proposed at this time. The salary structure provided in August 2024 was

developed to place OCERS salaries competitive with the market, while also ensuring both internal and external equity.

## Using the Market Data as a Tool

Gallagher would like to reiterate that this report is an addendum to the report submitted in August 2024 and the findings are meant to be a tool for OCERS to create and implement an equitable classification and compensation system, should the agency decide to bring the County of Orange assigned positions under the auspices/governance of OCERS. There are additional steps outside of the scope of this study before OCERS can implement such a plan and the collected data presented herein represents a market survey that will give OCERS an instrument to make future compensation decisions.

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

*Maggie Williams-Dalgart*

Maggie Williams-Dalgart, Project Manager  
Gallagher, Formerly Koff & Associates

## Appendix I

### Results Summary



**Orange County Employees Retirement System**  
**Results Summary**  
**April 2025**

Classification	Top Monthly Salary Data (Base Salary)			Total Compensation Data (Base Salary + Benefits)			# of Matches
	Top Monthly Salary	Median of Comparators	% above or below	Total Monthly Comp	Median of Comparators	% above or below	
Accountant	\$ 8,178	\$ 8,931	-9.2%	\$ 11,945	\$ 13,037	-9.1%	11
Accounting Specialist	proposed	\$ 6,399	proposed	proposed	\$ 10,196	proposed	4
Accounting Technician	\$ 5,773	\$ 6,087	-5.4%	\$ 9,066	\$ 9,306	-2.6%	11
Administrative Assistant	proposed	\$ 6,264	proposed	proposed	\$ 9,620	proposed	11
Disability Retirement Analyst II	\$ 7,096	\$ 8,643	-21.8%	\$ 10,649	\$ 12,273	-15.2%	8
Executive Assistant	\$ 7,586	\$ 7,450	1.8%	\$ 11,235	\$ 10,851	3.4%	11
Human Resources Technician	proposed	\$ 6,398	proposed	proposed	\$ 9,804	proposed	10
Information Technology Supervisor	proposed	\$ 12,638	proposed	proposed	\$ 17,572	proposed	8
Infrastructure Engineer II	\$ 9,866	\$ 10,230	-3.7%	\$ 13,965	\$ 14,542	-4.1%	11
IT Technician II	\$ 7,739	\$ 6,798	12.2%	\$ 11,419	\$ 10,552	7.6%	11
Office Assistant	\$ 4,304	\$ 4,791	-11.3%	\$ 7,308	\$ 7,817	-7.0%	11
Retirement Services Specialist II	\$ 6,240	\$ 7,327	-17.4%	\$ 9,624	\$ 11,686	-21.4%	8
Retirement Services Supervisor	\$ 7,929	\$ 9,901	-24.9%	\$ 11,646	\$ 14,295	-22.7%	8
Retirement Services Technician I	proposed	\$ 5,434	proposed	proposed	\$ 8,463	proposed	7
Senior Software Engineer	\$ 11,708	\$ 11,708	0.0%	\$ 16,168	\$ 16,936	-4.7%	9
Software Engineer	\$ 10,219	\$ 10,219	0.0%	\$ 14,386	\$ 14,539	-1.1%	9
Staff Specialist	\$ 7,096	\$ 6,709	5.5%	\$ 10,649	\$ 10,397	2.4%	10
Support Services Assistant	\$ 4,676	\$ 5,158	-10.3%	\$ 7,754	\$ 8,431	-8.7%	8
Training Specialist	\$ 7,719	\$ 8,650	-12.1%	\$ 11,395	\$ 12,781	-12.2%	7
<b>AVERAGE:</b>			<b>-6.9%</b>	<b>AVERAGE:</b>			<b>-6.8%</b>

## Appendix II

### Market Compensation Findings





**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Accountant</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	California Public Employees Retirement System	Financial Accountant I	\$ 9,080	\$ 4,575	\$ 13,655	7/1/2024	7/1/2025	3.00%
2	California State Teachers' Retirement System	Financial Accountant I	\$ 9,080	\$ 4,575	\$ 13,655	7/1/2024	7/1/2025	3.00%
3	City of Santa Ana	Accountant II	\$ 9,345	\$ 3,934	\$ 13,279	7/14/2024	unknown	unknown
4	San Bernardino County Employees' Retirement Association	Accountant	\$ 9,507	\$ 3,741	\$ 13,249	12/28/2024	unknown	unknown
5	Los Angeles Fire and Police Pensions	Accountant	\$ 8,931	\$ 4,106	\$ 13,037	9/22/2024	6/29/2025	2.00%
6	Los Angeles City Employees' Retirement System	Accountant	\$ 8,931	\$ 4,106	\$ 13,037	9/22/2024	6/29/2025	2.00%
7	San Diego City Employees' Retirement System	Retirement Financial Specialist II	\$ 8,048	\$ 4,082	\$ 12,130	7/1/2024	1/1/2025	2.00%
8	Los Angeles County Employees Retirement Association	Accountant, LACERA	\$ 7,758	\$ 4,350	\$ 12,107	1/1/2024	unknown	unknown
9	<b>Orange County Employees Retirement System</b>	<b>Accountant</b>	<b>\$ 8,178</b>	<b>\$ 3,766</b>	<b>\$ 11,945</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
10	County of Orange	Accountant/Auditor II	\$ 8,178	\$ 3,766	\$ 11,945	6/28/2024	6/27/2025	4.00%
11	City of Orange	Accountant	\$ 7,969	\$ 3,566	\$ 11,535	12/31/2023	unknown	unknown
12	San Diego County Employees Retirement Association	Retirement Accountant	\$ 7,254	\$ 3,365	\$ 10,619	7/2/2024	unknown	unknown

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 8,553	\$ 12,568
% Orange County Employees Retirement System Above/Below	-4.6%	-5.2%
Median of Comparators	\$ 8,931	\$ 13,037
% Orange County Employees Retirement System Above/Below	-9.2%	-9.1%
Number of Matches	11	11

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Accounting Specialist</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Orange County Employees Retirement System	Accounting Specialist	proposed					
2	California Public Employees Retirement System	Accounting Officer (Specialist)	\$ 6,399	\$ 4,127	\$ 10,526	7/1/2024	7/1/2025	3.00%
3	California State Teachers' Retirement System	Accounting Officer (Specialist)	\$ 6,399	\$ 4,127	\$ 10,526	7/1/2024	7/1/2025	3.00%
4	City of Orange	Finance Assistant	\$ 6,560	\$ 3,306	\$ 9,866	12/31/2023	unknown	unknown
5	San Diego County Employees Retirement Association	Retirement Associate Accountant	\$ 6,306	\$ 3,190	\$ 9,496	7/2/2024	unknown	unknown
6	Los Angeles City Employees' Retirement System	N/C						
7	San Diego City Employees' Retirement System	N/C						
8	Los Angeles Fire and Police Pensions	N/C						
9	San Bernardino County Employees' Retirement Association	N/C						
10	Los Angeles County Employees Retirement Association	N/C						
11	County of Orange	N/C						
12	City of Santa Ana	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 6,416	\$ 10,104
% Orange County Employees Retirement System Above/Below		
Median of Comparators	\$ 6,399	\$ 10,196
% Orange County Employees Retirement System Above/Below		
Number of Matches	4	4

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Accounting Technician</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	San Bernardino County Employees' Retirement Association	Accounting Technician	\$ 7,797	\$ 3,404	\$ 11,200	12/28/2024	unknown	unknown
2	Los Angeles City Employees' Retirement System	Accounting Clerk	\$ 7,176	\$ 3,761	\$ 10,937	10/20/2024	6/29/2025	4.00%
3	Los Angeles Fire and Police Pensions	Accounting Clerk	\$ 7,176	\$ 3,761	\$ 10,937	10/20/2024	6/29/2025	4.00%
4	Los Angeles County Employees Retirement Association	Accounting Technician I, LACERA	\$ 6,152	\$ 3,964	\$ 10,117	1/1/2024	unknown	unknown
5	City of Santa Ana	Accounting Assistant	\$ 6,326	\$ 3,367	\$ 9,693	7/14/2024	unknown	unknown
6	City of Orange	Senior Finance Clerk	\$ 6,087	\$ 3,219	\$ 9,306	12/31/2023	unknown	unknown
7	<b>Orange County Employees Retirement System</b>	<b>Accounting Technician</b>	<b>\$ 5,773</b>	<b>\$ 3,293</b>	<b>\$ 9,066</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
8	County of Orange	Accounting Technician	\$ 5,773	\$ 3,293	\$ 9,066	6/28/2024	6/27/2025	4.00%
9	San Diego County Employees Retirement Association	Retirement Accounting Specialist	\$ 5,434	\$ 3,029	\$ 8,463	7/2/2024	unknown	unknown
10	California State Teachers' Retirement System	Accounting Technician	\$ 4,710	\$ 3,707	\$ 8,417	7/1/2024	7/1/2025	3.00%
11	California Public Employees Retirement System	Accounting Technician	\$ 4,710	\$ 3,707	\$ 8,417	7/1/2024	7/1/2025	3.00%
12	San Diego City Employees' Retirement System	Account Clerk	\$ 4,660	\$ 3,188	\$ 7,848	7/1/2024	1/1/2025	2.00%

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 6,000	\$ 9,491
% Orange County Employees Retirement System Above/Below	-3.9%	-4.7%
Median of Comparators	\$ 6,087	\$ 9,306
% Orange County Employees Retirement System Above/Below	-5.4%	-2.6%
Number of Matches	11	11

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Administrative Assistant</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Orange County Employees Retirement System	Administrative Assistant	proposed					
2	Los Angeles City Employees' Retirement System	Secretary	\$ 7,392	\$ 3,803	\$ 11,195	10/20/2024	6/29/2025	4.00%
3	Los Angeles Fire and Police Pensions	Secretary	\$ 7,392	\$ 3,803	\$ 11,195	10/20/2024	6/29/2025	4.00%
4	San Bernardino County Employees' Retirement Association	Executive Secretary	\$ 7,063	\$ 3,728	\$ 10,792	12/28/2024	unknown	unknown
5	Los Angeles County Employees Retirement Association	Administrative Assistant, LACERA	\$ 6,275	\$ 3,994	\$ 10,269	10/1/2023	10/1/2024	3.25%
6	San Diego County Employees Retirement Association	Retirement Administrative Assistant	\$ 6,439	\$ 3,215	\$ 9,654	7/2/2024	unknown	unknown
7	City of Santa Ana	Secretary	\$ 6,264	\$ 3,356	\$ 9,620	7/14/2024	unknown	unknown
8	City of Orange	Administrative Assistant	\$ 6,148	\$ 3,230	\$ 9,378	12/31/2023	unknown	unknown
9	California Public Employees Retirement System	Management Services Technician	\$ 4,885	\$ 3,750	\$ 8,635	7/1/2024	7/1/2025	3.00%
10	California State Teachers' Retirement System	Management Services Technician	\$ 4,885	\$ 3,750	\$ 8,635	7/1/2024	7/1/2025	3.00%
11	County of Orange	Office Specialist	\$ 5,063	\$ 3,153	\$ 8,217	6/28/2024	6/27/2025	4.00%
12	San Diego City Employees' Retirement System	Office Support Specialist	\$ 4,582	\$ 3,168	\$ 7,750	7/1/2024	1/1/2025	2.00%

<b>Summary Results</b>		<b>Top Monthly</b>	<b>Total Monthly</b>
Average of Comparators		\$ 6,035	\$ 9,576
% Orange County Employees Retirement System Above/Below			
Median of Comparators		\$ 6,264	\$ 9,620
% Orange County Employees Retirement System Above/Below			
Number of Matches		11	11

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Disability Retirement Analyst II</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles City Employees' Retirement System	Benefit Analyst	\$ 10,873	\$ 4,487	\$ 15,360	9/22/2024	6/29/2025	2.00%
2	Los Angeles Fire and Police Pensions	Benefits Analyst	\$ 10,873	\$ 4,487	\$ 15,360	9/22/2024	6/29/2025	2.00%
3	Los Angeles County Employees Retirement Association	Disability Retirement Specialist	\$ 8,731	\$ 4,527	\$ 13,258	1/1/2024	unknown	unknown
4	San Diego County Employees Retirement Association	Retirement Disability Specialist	\$ 8,677	\$ 3,695	\$ 12,372	7/2/2024	unknown	unknown
5	San Bernardino County Employees' Retirement Association	Disability Retirement Specialist	\$ 8,609	\$ 3,564	\$ 12,174	12/28/2024	unknown	unknown
6	California Public Employees Retirement System	Associate Government Program Analyst	\$ 7,327	\$ 4,358	\$ 11,686	7/1/2024	7/1/2025	3.00%
7	California State Teachers' Retirement System	Associate Government Program Analyst	\$ 7,327	\$ 4,358	\$ 11,686	7/1/2024	7/1/2025	3.00%
8	<b>Orange County Employees Retirement System</b>	<b>Disability Retirement Analyst II</b>	<b>\$ 7,096</b>	<b>\$ 3,553</b>	<b>\$ 10,649</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
9	County of Orange	Disability Retirement Investigator	\$ 7,096	\$ 3,553	\$ 10,649	6/28/2024	6/27/2025	4.00%
10	City of Orange	N/C						
11	San Diego City Employees' Retirement System	N/C						
12	City of Santa Ana	N/C						

<b>Summary Results</b>		
	<b>Top Monthly</b>	<b>Total Monthly</b>
Average of Comparators	\$ 8,689	\$ 12,818
% Orange County Employees Retirement System Above/Below	-22.5%	-20.4%
Median of Comparators	\$ 8,643	\$ 12,273
% Orange County Employees Retirement System Above/Below	-21.8%	-15.2%
Number of Matches	8	8

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Executive Assistant</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	San Bernardino County Employees' Retirement Association	Executive Assistant	\$ 10,045	\$ 4,797	\$ 14,841	2/24/2024	2/22/2025	3.00%
2	Los Angeles County Employees Retirement Association	Executive Administrative Assistant, LACERA	\$ 9,518	\$ 4,716	\$ 14,234	10/1/2023	10/1/2024	3.25%
3	Los Angeles Fire and Police Pensions	Executive Administrative Assistant II	\$ 9,532	\$ 4,224	\$ 13,755	9/22/2024	6/29/2025	3.00%
4	Los Angeles City Employees' Retirement System	Executive Administrative Assistant II	\$ 9,532	\$ 4,224	\$ 13,755	9/22/2024	6/29/2025	3.00%
5	<b>Orange County Employees Retirement System</b>	<b>Executive Assistant</b>	<b>\$ 7,586</b>	<b>\$ 3,650</b>	<b>\$ 11,235</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
6	County of Orange	Executive Secretary I	\$ 7,586	\$ 3,650	\$ 11,235	6/28/2024	6/27/2025	4.00%
7	San Diego County Employees Retirement Association	Retirement Executive Secretary	\$ 7,450	\$ 3,402	\$ 10,851	7/2/2024	unknown	unknown
8	City of Santa Ana	Executive Secretary	\$ 7,214	\$ 3,562	\$ 10,776	7/14/2024	unknown	unknown
9	City of Orange	Executive Assistant	\$ 6,399	\$ 3,825	\$ 10,224	7/1/2023	unknown	unknown
10	San Diego City Employees' Retirement System	Executive Assistant	\$ 6,367	\$ 3,639	\$ 10,005	7/1/2024	1/1/2025	2.00%
11	California State Teachers' Retirement System	Executive Assistant	\$ 5,924	\$ 4,009	\$ 9,932	7/1/2024	7/1/2025	3.00%
12	California Public Employees Retirement System	Executive Assistant	\$ 5,924	\$ 4,009	\$ 9,932	7/1/2024	7/1/2025	3.00%

<b>Summary Results</b>		<b>Top Monthly</b>	<b>Total Monthly</b>
Average of Comparators		\$ 7,772	\$ 11,777
% Orange County Employees Retirement System Above/Below		-2.5%	-4.8%
Median of Comparators		\$ 7,450	\$ 10,851
% Orange County Employees Retirement System Above/Below		1.8%	3.4%
Number of Matches		11	11

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

Human Resources Technician								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Orange County Employees Retirement System	Human Resources Technician	proposed					
2	Los Angeles County Employees Retirement Association	Senior Human Resources Assistant, LACERA	\$ 7,348	\$ 4,195	\$ 11,542	10/1/2023	10/1/2024	3.25%
3	Los Angeles City Employees' Retirement System	Management Aide	\$ 7,433	\$ 3,812	\$ 11,245	9/22/2024	6/29/2025	2.00%
4	Los Angeles Fire and Police Pensions	Management Aide	\$ 7,433	\$ 3,812	\$ 11,245	9/22/2024	6/29/2025	2.00%
5	City of Santa Ana	Human Resources Technician	\$ 7,284	\$ 3,575	\$ 10,859	7/14/2024	unknown	unknown
6	San Bernardino County Employees' Retirement Association	Human Resources Technician	\$ 6,398	\$ 3,535	\$ 9,932	12/28/2024	unknown	unknown
7	City of Orange	Human Resources Technician	\$ 6,399	\$ 3,276	\$ 9,675	12/31/2023	unknown	unknown
8	California Public Employees Retirement System	Personnel Technician II	\$ 5,600	\$ 3,928	\$ 9,528	7/1/2024	7/1/2025	3.00%
9	California State Teachers' Retirement System	Personnel Technician II (Specialist)	\$ 5,600	\$ 3,928	\$ 9,528	7/1/2024	7/1/2025	3.00%
10	San Diego City Employees' Retirement System	Personnel Assistant II	\$ 5,735	\$ 3,472	\$ 9,206	7/1/2024	1/1/2025	2.00%
11	San Diego County Employees Retirement Association	Human Resources Assistant	\$ 5,467	\$ 3,035	\$ 8,502	7/2/2024	unknown	unknown
12	County of Orange	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 6,470	\$ 10,126
% Orange County Employees Retirement System Above/Below		
Median of Comparators	\$ 6,398	\$ 9,804
% Orange County Employees Retirement System Above/Below		
Number of Matches	10	10

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Information Technology Supervisor</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Orange County Employees Retirement System	Information Technology Supervisor	proposed					
2	City of Santa Ana	Information Technology Infrastructure Supervisor	\$ 13,811	\$ 5,310	\$ 19,121	7/14/2024	unknown	unknown
3	Los Angeles City Employees' Retirement System	Systems Administrator	\$ 13,937	\$ 5,088	\$ 19,026	9/22/2024	6/29/2025	2.00%
4	Los Angeles Fire and Police Pensions	Systems Administrator	\$ 13,937	\$ 5,088	\$ 19,026	9/22/2024	6/29/2025	2.00%
5	Los Angeles County Employees Retirement Association	Data Systems Supervisor I, LACERA	\$ 12,361	\$ 5,455	\$ 17,815	10/1/2023	10/1/2024	3.25%
6	San Bernardino County Employees' Retirement Association	Information Security Supervisor	\$ 12,915	\$ 4,414	\$ 17,329	2/24/2024	2/22/2025	3.00%
7	California Public Employees Retirement System	Information Technology Supervisor II	\$ 11,063	\$ 5,080	\$ 16,143	7/1/2024	7/1/2025	3.00%
8	California State Teachers' Retirement System	Information Technology Supervisor II	\$ 11,063	\$ 5,080	\$ 16,143	7/1/2024	7/1/2025	3.00%
9	City of Orange	Information Technology Supervisor	\$ 9,162	\$ 4,110	\$ 13,272	12/31/2023	unknown	unknown
10	San Diego City Employees' Retirement System	N/C						
11	County of Orange	N/C						
12	San Diego County Employees Retirement Association	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 12,281	\$ 17,234
% Orange County Employees Retirement System Above/Below		
Median of Comparators	\$ 12,638	\$ 17,572
% Orange County Employees Retirement System Above/Below		
Number of Matches	8	8

N/C - Non Comparator





**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Infrastructure Engineer II</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles County Employees Retirement Association	Data Systems Analyst II, LACERA	\$ 10,901	\$ 5,104	\$ 16,006	10/1/2023	10/1/2024	3.25%
2	California Public Employees Retirement System	Information Technology Specialist I	\$ 10,230	\$ 5,081	\$ 15,311	7/1/2024	7/1/2025	3.00%
3	California State Teachers' Retirement System	Information Technology Specialist I	\$ 10,230	\$ 5,081	\$ 15,311	7/1/2024	7/1/2025	3.00%
4	Los Angeles City Employees' Retirement System	Systems Analyst	\$ 10,437	\$ 4,401	\$ 14,838	9/22/2024	6/29/2025	2.00%
5	Los Angeles Fire and Police Pensions	Systems Analyst	\$ 10,437	\$ 4,401	\$ 14,838	9/22/2024	6/29/2025	2.00%
6	San Bernardino County Employees' Retirement Association	Information Systems Engineer	\$ 10,587	\$ 3,955	\$ 14,542	12/28/2024	unknown	unknown
7	San Diego County Employees Retirement Association	Retirement Technology Systems Specialist	\$ 10,494	\$ 4,045	\$ 14,539	7/2/2024	unknown	unknown
8	City of Orange	System Analyst	\$ 9,727	\$ 4,706	\$ 14,433	7/1/2023	unknown	unknown
9	City of Santa Ana	Network Specialist/WAN Systems Administrator	\$ 10,059	\$ 4,068	\$ 14,127	7/14/2024	unknown	unknown
10	<b>Orange County Employees Retirement System</b>	<b>Infrastructure Engineer II</b>	<b>\$ 9,866</b>	<b>\$ 4,098</b>	<b>\$ 13,965</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
11	County of Orange <sup>1</sup>	[IT Network Engineer II/ IT Systems Engineer II]	\$ 9,866	\$ 4,098	\$ 13,965	6/28/2024	6/27/2025	4.00%
12	San Diego City Employees' Retirement System	Information Systems Analyst II	\$ 8,202	\$ 4,290	\$ 12,492	7/1/2024	1/1/2025	2.00%

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 10,106	\$ 14,582
% Orange County Employees Retirement System Above/Below	-2.4%	-4.4%
Median of Comparators	\$ 10,230	\$ 14,542
% Orange County Employees Retirement System Above/Below	-3.7%	-4.1%
Number of Matches	11	11

N/C - Non Comparator

1 - County of Orange: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>IT Technician II</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	City of Orange	Information Technology Specialist	\$ 8,089	\$ 3,875	\$ 11,964	12/31/2023	unknown	unknown
2	County of Orange	IT Systems Technician II	\$ 7,739	\$ 3,680	\$ 11,419	6/28/2024	6/27/2025	4.00%
3	<b>Orange County Employees Retirement System</b>	<b>IT Technician II</b>	<b>\$ 7,739</b>	<b>\$ 3,680</b>	<b>\$ 11,419</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
4	San Bernardino County Employees' Retirement Association	Information Systems Technician	\$ 7,797	\$ 3,404	\$ 11,200	12/28/2024	unknown	unknown
5	City of Santa Ana	Information Technology Support Technician II	\$ 7,504	\$ 3,589	\$ 11,093	7/14/2024	unknown	unknown
6	San Diego County Employees Retirement Association	Information Technology Specialist	\$ 7,505	\$ 3,470	\$ 10,975	7/2/2024	unknown	unknown
7	California Public Employees Retirement System	Information Technology Technician	\$ 6,420	\$ 4,132	\$ 10,552	7/1/2024	7/1/2025	3.00%
8	Los Angeles City Employees' Retirement System	Computer Operator	\$ 6,798	\$ 3,687	\$ 10,485	9/22/2024	6/29/2025	2.00%
9	Los Angeles Fire and Police Pensions	Computer Operator	\$ 6,798	\$ 3,687	\$ 10,485	9/22/2024	6/29/2025	2.00%
10	San Diego City Employees' Retirement System	Information Systems Technician	\$ 6,446	\$ 3,826	\$ 10,272	7/1/2024	1/1/2025	2.00%
11	Los Angeles County Employees Retirement Association	Systems Aid, LACERA	\$ 5,988	\$ 3,925	\$ 9,913	10/1/2023	10/1/2024	3.25%
12	California State Teachers' Retirement System	Information Systems Technician	\$ 5,592	\$ 3,926	\$ 9,518	7/1/2024	7/1/2025	3.00%

<b>Summary Results</b>		<b>Top Monthly</b>	<b>Total Monthly</b>
Average of Comparators		\$ 6,971	\$ 10,716
% Orange County Employees Retirement System Above/Below		9.9%	6.2%
Median of Comparators		\$ 6,798	\$ 10,552
% Orange County Employees Retirement System Above/Below		12.2%	7.6%
Number of Matches		11	11

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Office Assistant</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles City Employees' Retirement System	Administrative Clerk	\$ 7,176	\$ 3,761	\$ 10,937	10/20/2024	6/29/2025	4.00%
2	Los Angeles Fire and Police Pensions	Administrative Clerk	\$ 7,176	\$ 3,761	\$ 10,937	10/20/2024	6/29/2025	4.00%
3	City of Santa Ana	Senior Office Assistant	\$ 5,683	\$ 3,247	\$ 8,930	7/14/2024	unknown	unknown
4	San Bernardino County Employees' Retirement	[Receptionist/ Office Specialist]	\$ 5,795	\$ 3,008	\$ 8,803	12/28/2024	unknown	unknown
5	Los Angeles County Employees Retirement Association <sup>1</sup>	[Intermediate Typist Clerk, LACERA/ Receptionist, LACE]	\$ 4,916	\$ 3,667	\$ 8,583	10/1/2023	10/1/2024	3.25%
6	California Public Employees Retirement System	Office Assistant (General)	\$ 4,230	\$ 3,587	\$ 7,817	7/1/2024	7/1/2025	3.00%
7	California State Teachers' Retirement System	Office Assistant	\$ 4,230	\$ 3,587	\$ 7,817	7/1/2024	7/1/2025	3.00%
8	City of Orange	Office Assistant	\$ 4,791	\$ 2,979	\$ 7,770	12/31/2023	unknown	unknown
9	San Diego City Employees' Retirement System	Clerical Assistant II	\$ 4,441	\$ 3,130	\$ 7,571	7/1/2024	1/1/2025	2.00%
10	<b>Orange County Employees Retirement System</b>	<b>Office Assistant</b>	<b>\$ 4,304</b>	<b>\$ 3,004</b>	<b>\$ 7,308</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
11	County of Orange	Office Technician	\$ 4,304	\$ 3,004	\$ 7,308	6/28/2024	6/27/2025	4.00%
12	San Diego County Employees Retirement Association	Office Assistant	\$ 4,082	\$ 2,680	\$ 6,762	6/28/2024	unknown	unknown

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 5,166	\$ 8,476
% Orange County Employees Retirement System Above/Below	-20.0%	-16.0%
Median of Comparators	\$ 4,791	\$ 7,817
% Orange County Employees Retirement System Above/Below	-11.3%	-7.0%
Number of Matches	11	11

N/C - Non Comparator

1 - Los Angeles County Employees Retirement Association: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the same for both matches.

2 - San Bernardino County Employees' Retirement Association: Functional Match: This hybrid match represents that the duties of the class are performed by more than one class at the comparator agency. The salary displayed is the higher of the matches.



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Retirement Services Specialist II</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles City Employees' Retirement System	Benefits Specialist	\$ 8,237	\$ 3,969	\$ 12,207	9/22/2024	6/29/2025	2.00%
2	Los Angeles Fire and Police Pensions	Benefits Specialist	\$ 8,237	\$ 3,969	\$ 12,207	9/22/2024	6/29/2025	2.00%
3	San Bernardino County Employees' Retirement Association	Retirement Specialist	\$ 8,609	\$ 3,564	\$ 12,174	12/28/2024	unknown	unknown
4	California Public Employees Retirement System	Associate Government Program Analyst	\$ 7,327	\$ 4,358	\$ 11,686	7/1/2024	7/1/2025	3.00%
5	California State Teachers' Retirement System	Associate Government Program Analyst	\$ 7,327	\$ 4,358	\$ 11,686	7/1/2024	7/1/2025	3.00%
6	Los Angeles County Employees Retirement Association	Retirement Benefits Specialist II	\$ 7,046	\$ 4,179	\$ 11,224	1/1/2024	unknown	unknown
7	San Diego County Employees Retirement Association	Retirement Member Services Specialist	\$ 6,439	\$ 3,215	\$ 9,654	7/2/2024	unknown	unknown
8	<b>Orange County Employees Retirement System</b>	<b>Retirement Services Specialist II</b>	<b>\$ 6,240</b>	<b>\$ 3,385</b>	<b>\$ 9,624</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
9	County of Orange	Retirement Program Specialist	\$ 6,240	\$ 3,385	\$ 9,624	6/28/2024	6/27/2025	4.00%
10	City of Orange	N/C						
11	San Diego City Employees' Retirement System	N/C						
12	City of Santa Ana	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 7,433	\$ 11,308
% Orange County Employees Retirement System Above/Below	-19.1%	-17.5%
Median of Comparators	\$ 7,327	\$ 11,686
% Orange County Employees Retirement System Above/Below	-17.4%	-21.4%
Number of Matches	8	8

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Retirement Services Supervisor</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles City Employees' Retirement System	Senior Benefits Analyst	\$ 13,358	\$ 4,975	\$ 18,333	9/22/2024	6/29/2025	2.00%
2	Los Angeles Fire and Police Pensions	Senior Benefits Analyst	\$ 13,358	\$ 4,975	\$ 18,333	9/22/2024	6/29/2025	2.00%
3	San Bernardino County Employees' Retirement Association	Retirement Specialist Supervisor	\$ 13,567	\$ 4,543	\$ 18,110	12/28/2024	unknown	unknown
4	Los Angeles County Employees Retirement Association	Senior Retirement Benefits Specialist	\$ 9,755	\$ 4,829	\$ 14,585	1/1/2024	unknown	unknown
5	San Diego County Employees Retirement Association <sup>1</sup>	[Retirement Member Services Senior Specialists/ Retirement Specialist Supervisor]	\$ 10,046	\$ 3,959	\$ 14,005	7/2/2024	unknown	unknown
6	California Public Employees Retirement System	Pension Program Manager I	\$ 8,710	\$ 4,480	\$ 13,190	7/1/2024	7/1/2025	3.00%
7	California State Teachers' Retirement System	Pension Program Manager I	\$ 8,710	\$ 4,480	\$ 13,190	7/1/2024	7/1/2025	3.00%
8	<b>Orange County Employees Retirement System</b>	<b>Retirement Services Supervisor</b>	<b>\$ 7,929</b>	<b>\$ 3,717</b>	<b>\$ 11,646</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
9	County of Orange	Retirement Benefits Program Supervisor	\$ 7,929	\$ 3,717	\$ 11,646	6/28/2024	6/27/2025	4.00%
10	City of Orange	N/C						
11	San Diego City Employees' Retirement System	N/C						
12	City of Santa Ana	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 10,679	\$ 15,174
% Orange County Employees Retirement System Above/Below	-34.7%	-30.3%
Median of Comparators	\$ 9,901	\$ 14,295
% Orange County Employees Retirement System Above/Below	-24.9%	-22.7%
Number of Matches	8	8

N/C - Non Comparator

1 - San Diego County Employees Retirement Association: Span of Responsibility Match: This hybrid match represents that the duties are bridged by a higher and lower-level classification at the comparator agency. The salary displayed is an average of the matches.



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Retirement Services Technician I</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Orange County Employees Retirement System	Retirement Services Technician I	proposed					
2	Los Angeles County Employees Retirement Association	Retirement Benefit Specialist I	\$ 5,988	\$ 3,925	\$ 9,913	1/1/2024	unknown	unknown
3	San Bernardino County Employees' Retirement Association	Retirement Benefits Technician	\$ 6,398	\$ 3,127	\$ 9,525	12/28/2024	unknown	unknown
4	County of Orange	Retirement Benefits Technician	\$ 5,773	\$ 3,293	\$ 9,066	6/28/2024	6/27/2025	4.00%
5	San Diego County Employees Retirement Association	Retirement Member Services Associate	\$ 5,434	\$ 3,029	\$ 8,463	7/2/2024	unknown	unknown
6	San Diego City Employees' Retirement System	Retirement Assistant	\$ 5,116	\$ 3,308	\$ 8,424	7/1/2024	1/1/2025	2.00%
7	California Public Employees Retirement System	Pension Program Representative	\$ 4,573	\$ 3,672	\$ 8,246	7/1/2024	7/1/2025	3.00%
8	California State Teachers' Retirement System	Pension Program Representative	\$ 4,573	\$ 3,672	\$ 8,246	7/1/2024	7/1/2025	3.00%
9	City of Orange	N/C						
10	City of Santa Ana	N/C						
11	Los Angeles City Employees' Retirement System	N/C						
12	Los Angeles Fire and Police Pensions	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 5,408	\$ 8,840
% Orange County Employees Retirement System Above/Below		
Median of Comparators	\$ 5,434	\$ 8,463
% Orange County Employees Retirement System Above/Below		
Number of Matches	7	7

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Senior Software Engineer</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	San Bernardino County Employees' Retirement Association	Senior Business Systems Engineer	\$ 14,406	\$ 4,709	\$ 19,115	12/28/2024	unknown	unknown
2	San Diego County Employees Retirement Association	Retirement Business Systems Engineer	\$ 13,090	\$ 4,546	\$ 17,636	7/2/2024	unknown	unknown
3	California Public Employees Retirement System	Information Technology Specialist II	\$ 11,558	\$ 5,411	\$ 16,969	7/1/2024	7/1/2025	3.00%
4	California State Teachers' Retirement System	Information Technology Specialist II	\$ 11,558	\$ 5,411	\$ 16,969	7/1/2024	7/1/2025	3.00%
5	Los Angeles County Employees Retirement Association	EDP Senior Programmer Analyst, LACERA	\$ 11,651	\$ 5,285	\$ 16,936	10/1/2023	10/1/2024	3.25%
6	Los Angeles City Employees' Retirement System	Programmer Analyst IV	\$ 12,029	\$ 4,714	\$ 16,742	9/22/2024	6/29/2025	4.00%
7	Los Angeles Fire and Police Pensions	Programmer Analyst IV	\$ 12,029	\$ 4,714	\$ 16,742	9/22/2024	6/29/2025	4.00%
8	<b>Orange County Employees Retirement System</b>	<b>Senior Software Engineer</b>	<b>\$ 11,708</b>	<b>\$ 4,461</b>	<b>\$ 16,168</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
9	County of Orange	Senior IT Applications Developer	\$ 11,708	\$ 4,461	\$ 16,168	6/28/2024	6/27/2025	4.00%
10	City of Santa Ana	Senior Programmer Analyst	\$ 11,090	\$ 4,262	\$ 15,352	7/14/2024	unknown	unknown
11	City of Orange	N/C						
12	San Diego City Employees' Retirement System	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 12,124	\$ 16,959
% Orange County Employees Retirement System Above/Below	-3.6%	-4.9%
Median of Comparators	\$ 11,708	\$ 16,936
% Orange County Employees Retirement System Above/Below	-0.0%	-4.7%
Number of Matches	9	9

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Software Engineer</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	San Bernardino County Employees' Retirement Association	Business Systems Engineer	\$ 12,743	\$ 4,380	\$ 17,124	12/28/2024	unknown	unknown
2	California Public Employees Retirement System	Information Technology Specialist I	\$ 10,230	\$ 5,081	\$ 15,311	7/1/2024	7/1/2025	3.00%
3	California State Teachers' Retirement System	Information Technology Specialist I	\$ 10,230	\$ 5,081	\$ 15,311	7/1/2024	7/1/2025	3.00%
4	Los Angeles County Employees Retirement Association	EDP Programmer Analyst, LACERA	\$ 10,174	\$ 4,930	\$ 15,104	10/1/2023	10/1/2024	3.25%
5	San Diego County Employees Retirement Association	Retirement Technology Systems Specialist	\$ 10,494	\$ 4,045	\$ 14,539	7/2/2024	unknown	unknown
6	Los Angeles City Employees' Retirement System	Programmer Analyst II	\$ 10,177	\$ 4,350	\$ 14,528	9/22/2024	6/29/2025	4.00%
7	Los Angeles Fire and Police Pensions	Programmer Analyst II	\$ 10,177	\$ 4,350	\$ 14,528	9/22/2024	6/29/2025	4.00%
8	<b>Orange County Employees Retirement System</b>	<b>Software Engineer</b>	<b>\$ 10,219</b>	<b>\$ 4,168</b>	<b>\$ 14,386</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
9	County of Orange	IT Applications Developer II	\$ 10,219	\$ 4,168	\$ 14,386	6/28/2024	6/27/2025	4.00%
10	City of Santa Ana	Programmer Analyst	\$ 10,059	\$ 4,068	\$ 14,127	7/14/2024	unknown	unknown
11	City of Orange	N/C						
12	San Diego City Employees' Retirement System	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 10,500	\$ 14,995
% Orange County Employees Retirement System Above/Below	-2.8%	-4.2%
Median of Comparators	\$ 10,219	\$ 14,539
% Orange County Employees Retirement System Above/Below	-0.0%	-1.1%
Number of Matches	9	9

N/C - Non Comparator





**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Staff Specialist</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	San Bernardino County Employees' Retirement Association	Senior Executive Secretary	\$ 9,197	\$ 4,349	\$ 13,546	2/24/2024	2/22/2025	3.00%
2	Los Angeles County Employees Retirement Association	Staff Assistant II, LACERA	\$ 7,624	\$ 4,318	\$ 11,942	10/1/2023	10/1/2024	3.25%
3	Los Angeles Fire and Police Pensions	Management Assistant	\$ 7,433	\$ 3,812	\$ 11,245	9/22/2024	6/29/2025	2.00%
4	Los Angeles City Employees' Retirement System	Management Assistant	\$ 7,433	\$ 3,812	\$ 11,245	9/22/2024	6/29/2025	2.00%
5	<b>Orange County Employees Retirement System</b>	<b>Staff Specialist</b>	<b>\$ 7,096</b>	<b>\$ 3,553</b>	<b>\$ 10,649</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
6	County of Orange	Staff Specialist	\$ 7,096	\$ 3,553	\$ 10,649	6/28/2024	6/27/2025	4.00%
7	California State Teachers' Retirement System	Staff Services Analyst	\$ 6,093	\$ 4,051	\$ 10,144	7/1/2024	7/1/2025	3.00%
8	California Public Employees Retirement System	Staff Services Analyst	\$ 6,093	\$ 4,051	\$ 10,144	7/1/2024	7/1/2025	3.00%
9	San Diego City Employees' Retirement System	Administrative Aide II	\$ 6,322	\$ 3,627	\$ 9,949	7/1/2024	1/1/2025	2.00%
10	City of Orange	Administrative Specialist	\$ 6,087	\$ 3,219	\$ 9,306	12/31/2023	unknown	unknown
11	San Diego County Employees Retirement Association	Retirement Administrative Secretary	\$ 5,434	\$ 3,029	\$ 8,463	7/2/2024	unknown	unknown
12	City of Santa Ana	N/C						

<b>Summary Results</b>		<b>Top Monthly</b>	<b>Total Monthly</b>
Average of Comparators		\$ 6,881	\$ 10,663
% Orange County Employees Retirement System Above/Below		3.0%	-0.1%
Median of Comparators		\$ 6,709	\$ 10,397
% Orange County Employees Retirement System Above/Below		5.5%	2.4%
Number of Matches		10	10

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

<b>Support Services Assistant</b>								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles County Employees Retirement Association	Procurement and Supply Clerk, LACERA	\$ 5,657	\$ 3,845	\$ 9,502	10/1/2023	10/1/2024	3.25%
2	City of Santa Ana	Stock Clerk	\$ 6,143	\$ 3,333	\$ 9,476	7/14/2024	unknown	unknown
3	California State Teachers' Retirement System	Materials and Stores Specialist	\$ 5,306	\$ 3,525	\$ 8,830	7/1/2024	7/1/2025	4.00%
4	California Public Employees Retirement System	Materials and Stores Specialist	\$ 5,306	\$ 3,525	\$ 8,830	7/1/2024	7/1/2025	4.00%
5	City of Orange	Stock Clerk	\$ 5,011	\$ 3,020	\$ 8,031	12/31/2023	unknown	unknown
6	<b>Orange County Employees Retirement System</b>	<b>Support Services Assistant</b>	<b>\$ 4,676</b>	<b>\$ 3,077</b>	<b>\$ 7,754</b>	<b>6/28/2024</b>	<b>6/27/2025</b>	<b>4.00%</b>
7	County of Orange	Store Clerk	\$ 4,676	\$ 3,077	\$ 7,754	6/28/2024	6/27/2025	4.00%
8	San Diego City Employees' Retirement System	Stock Clerk	\$ 4,054	\$ 3,028	\$ 7,082	7/1/2024	1/1/2025	2.00%
9	San Diego County Employees Retirement Association	Stock Clerk	\$ 4,131	\$ 2,689	\$ 6,820	6/28/2024	unknown	unknown
10	Los Angeles City Employees' Retirement System	N/C						
11	Los Angeles Fire and Police Pensions	N/C						
12	San Bernardino County Employees' Retirement Association	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 5,035	\$ 8,291
% Orange County Employees Retirement System Above/Below	-7.7%	-6.9%
Median of Comparators	\$ 5,158	\$ 8,431
% Orange County Employees Retirement System Above/Below	-10.3%	-8.7%
Number of Matches	8	8

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Market Compensation Data (sorted by Total Compensation)**  
**April 2025**

Training Specialist								
Rank	Comparator Agency	Classification Title	Top Monthly	Benefits Package	Total Monthly Comp	Salary Effective Date	Next Salary Increase	Next Percentage Increase
1	Los Angeles County Employees Retirement Association	Training Coordinator, LACERA	\$ 9,828	\$ 4,790	\$ 14,619	1/1/2024	unknown	unknown
2	California State Teachers' Retirement System	Training Officer II	\$ 8,650	\$ 4,465	\$ 13,115	7/1/2024	7/1/2025	3.00%
3	California Public Employees Retirement System	Training Officer II	\$ 8,650	\$ 4,465	\$ 13,115	7/1/2024	7/1/2025	3.00%
4	City of Santa Ana	Organizational Training and Development Analyst	\$ 8,897	\$ 3,884	\$ 12,781	7/14/2024	unknown	unknown
5	County of Orange	Staff Development Specialist	\$ 7,719	\$ 3,676	\$ 11,395	6/28/2024	6/27/2025	4.00%
6	Orange County Employees Retirement System	Training Specialist	\$ 7,719	\$ 3,676	\$ 11,395	6/28/2024	6/27/2025	4.00%
7	San Diego County Employees Retirement Association	Staff Development Specialist	\$ 7,753	\$ 3,517	\$ 11,270	7/2/2024	unknown	unknown
8	San Diego City Employees' Retirement System	Trainer	\$ 7,299	\$ 3,885	\$ 11,183	7/1/2024	1/1/2025	2.00%
9	City of Orange	N/C						
10	Los Angeles City Employees' Retirement System	N/C						
11	Los Angeles Fire and Police Pensions	N/C						
12	San Bernardino County Employees' Retirement Association	N/C						

Summary Results	Top Monthly	Total Monthly
Average of Comparators	\$ 8,400	\$ 12,497
% Orange County Employees Retirement System Above/Below	-8.8%	-9.7%
Median of Comparators	\$ 8,650	\$ 12,781
% Orange County Employees Retirement System Above/Below	-12.1%	-12.2%
Number of Matches	7	7

N/C - Non Comparator



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Accountant	Financial Accountant I	Financial Accountant I	Accountant	Accountant II	Accountant/Auditor II	Accountant	Accountant, LACERA	Accountant	Accountant	Retirement Financial Specialist II	Retirement Accountant
Retirement	Top Step	\$ 8,178	\$ 9,080	\$ 9,080	\$ 7,969	\$ 9,345	\$ 8,178	\$ 8,931	\$ 7,758	\$ 8,931	\$ 9,507	\$ 8,048	\$ 7,254
	PEPRA	1.62% @65	2% @62	2% @62	2% @62	2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67	2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 596	\$ 755	\$ 755	\$ 632	\$ 730	\$ 596	\$ 482	\$ 717	\$ 482	\$ 685	\$ 979	\$ 533
	Social Security		\$ 563	\$ 563									
	Deferred Compensation	\$ 164					\$ 164		\$ 310		\$ 95		
Insurance	Other Ret.												
	Cafeteria		\$ 2,262	\$ 2,262	\$ 2,095				\$ 2,431			\$ 1,958	\$ 2,023
	Health	\$ 2,105				\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental					\$ 130		\$ 47		\$ 47	\$ 21		
	Vision							\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52					\$ 52		\$ 57				
Leaves	Vacation	\$ 472	\$ 576	\$ 576	\$ 460	\$ 557	\$ 472	\$ 584	\$ 448	\$ 584	\$ 549	\$ 681	\$ 419
	Holidays	\$ 377	\$ 419	\$ 419	\$ 379	\$ 467	\$ 377	\$ 515	\$ 388	\$ 515	\$ 549	\$ 371	\$ 391
	Admin Leave							\$ 172		\$ 172		\$ 93	
	Auto												
Benefit Package Total		\$ 3,766	\$ 4,575	\$ 4,575	\$ 3,566	\$ 3,934	\$ 3,766	\$ 4,106	\$ 4,350	\$ 4,106	\$ 3,741	\$ 4,082	\$ 3,365



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Accounting Specialist	Accounting Officer (Specialist)	Accounting Officer (Specialist)	Finance Assistant	N/C	N/C	N/C	N/C	N/C	N/C	N/C	Retirement Associate Accountant
	<b>Top Step</b>	proposed	\$ 6,399	\$ 6,399	\$ 6,560								\$ 6,306
<b>Retirement</b>	PEPRA		2% @ 62	2% @ 62	2% @ 62								1.62% @ 65
	Employee Cost Share												
	Employer Normal Cost		\$ 532	\$ 532	\$ 520								\$ 463
	Social Security		\$ 397	\$ 397									
	Deferred Compensation												
	Other Ret.												
<b>Insurance</b>	Cafeteria				\$ 2,095								\$ 2,023
	Health		\$ 2,262	\$ 2,262									
	Dental		\$ 99	\$ 99									
	Vision		\$ 8	\$ 8									
	Other Ins.		\$ 165	\$ 165									
<b>Leaves</b>	Vacation		\$ 369	\$ 369	\$ 378								\$ 364
	Holidays		\$ 295	\$ 295	\$ 312								\$ 340
	Admin Leave												
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 0	\$ 4,127	\$ 4,127	\$ 3,306	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 3,190



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Accounting Technician	Accounting Technician	Accounting Technician	Senior Finance Clerk	Accounting Assistant	Accounting Technician	Accounting Clerk	Accounting Technician I, LACERA	Accounting Clerk	Accounting Technician	Account Clerk	Retirement Accounting Specialist
Retirement	Top Step	\$ 5,773	\$ 4,710	\$ 4,710	\$ 6,087	\$ 6,326	\$ 5,773	\$ 7,176	\$ 6,152	\$ 7,176	\$ 7,797	\$ 4,660	\$ 5,434
	PEPRA	1.62% @65	2% @62	2% @62	2% @62	2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67	2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 421	\$ 391	\$ 391	\$ 483	\$ 494	\$ 421	\$ 387	\$ 568	\$ 387	\$ 562	\$ 567	\$ 399
	Social Security	\$ 292	\$ 292	\$ 292									
	Deferred Compensation	\$ 115					\$ 115		\$ 246		\$ 78		
Insurance	Other Ret.												
	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
Leaves	Vacation	\$ 333	\$ 272	\$ 272	\$ 351	\$ 377	\$ 333	\$ 469	\$ 355	\$ 469	\$ 450	\$ 394	\$ 314
	Holidays	\$ 266	\$ 217	\$ 217	\$ 290	\$ 316	\$ 266	\$ 414	\$ 308	\$ 414	\$ 450	\$ 215	\$ 293
	Admin Leave							\$ 138		\$ 138		\$ 54	
	Auto												
Benefit Package Total		\$ 3,293	\$ 3,707	\$ 3,707	\$ 3,219	\$ 3,367	\$ 3,293	\$ 3,761	\$ 3,964	\$ 3,761	\$ 3,404	\$ 3,188	\$ 3,029



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Administrative Assistant	Management Services Technician	Management Services Technician	Administrative Assistant	Secretary	Office Specialist	Secretary	Administrative Assistant, LACERA	Secretary	Executive Secretary	Office Support Specialist	Retirement Administrative Assistant
	<b>Top Step</b>	proposed	\$ 4,885	\$ 4,885	\$ 6,148	\$ 6,264	\$ 5,063	\$ 7,392	\$ 6,275	\$ 7,392	\$ 7,063	\$ 4,582	\$ 6,439
Retirement	PEPRA		2% @ 62	2% @ 62	2% @ 62	2% @ 62	1.62% @ 65	2% @ 63	2.3% @ 65	2% @ 63	2.5% @ 67	2.6% @ 65	1.62% @ 65
	Employee Cost Share												
	Employer Normal Cost		\$ 406	\$ 406	\$ 488	\$ 489	\$ 369	\$ 399	\$ 580	\$ 399	\$ 509	\$ 557	\$ 473
	Social Security		\$ 303	\$ 303									
	Deferred Compensation						\$ 101		\$ 251		\$ 459		
	Other Ret.												
Insurance	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 2,023
	Health		\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,632		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.		\$ 165	\$ 165			\$ 52		\$ 57				
Leaves	Vacation		\$ 282	\$ 282	\$ 355	\$ 373	\$ 292	\$ 483	\$ 362	\$ 483	\$ 408	\$ 388	\$ 372
	Holidays		\$ 225	\$ 225	\$ 293	\$ 313	\$ 234	\$ 426	\$ 314	\$ 426	\$ 408	\$ 211	\$ 347
	Admin Leave							\$ 142		\$ 142	\$ 272	\$ 53	
Allow	Auto												
Benefit Package Total		\$ 0	\$ 3,750	\$ 3,750	\$ 3,230	\$ 3,356	\$ 3,153	\$ 3,803	\$ 3,994	\$ 3,803	\$ 3,728	\$ 3,168	\$ 3,215



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Disability Retirement Analyst II	Associate Government Program Analyst	Associate Government Program Analyst	N/C	N/C	Disability Retirement Investigator	Benefit Analyst	Disability Retirement Specialist	Benefits Analyst	Disability Retirement Specialist	N/C	Retirement Disability Specialist
<b>Retirement</b>	<b>Top Step</b>	\$ 7,096	\$ 7,327	\$ 7,327			\$ 7,096	\$ 10,873	\$ 8,731	\$ 10,873	\$ 8,609		\$ 8,677
	PEPRA	1.62% @65	2% @62	2% @62			1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67		1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 517	\$ 609	\$ 609			\$ 517	\$ 587	\$ 807	\$ 587	\$ 621		\$ 638
	Social Security		\$ 454	\$ 454									
	Deferred Compensation	\$ 142					\$ 142		\$ 349		\$ 86		
<b>Insurance</b>	Other Ret.												
	Cafeteria								\$ 2,431				\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262			\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99				\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52						
<b>Leaves</b>	Vacation	\$ 409	\$ 423	\$ 423			\$ 409	\$ 711	\$ 504	\$ 711	\$ 497		\$ 567
	Holidays	\$ 328	\$ 338	\$ 338			\$ 328	\$ 627	\$ 437	\$ 627	\$ 497		\$ 467
	Admin Leave							\$ 209		\$ 209			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 3,553	\$ 4,358	\$ 4,358	\$ 0	\$ 0	\$ 3,553	\$ 4,487	\$ 4,527	\$ 4,487	\$ 3,564	\$ 0	\$ 3,695





**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Executive Assistant	Executive Assistant	Executive Assistant	Executive Assistant	Executive Secretary	Executive Secretary I	Executive Administrative Assistant II	Executive Administrative Assistant, LACERA	Executive Administrative Assistant II	Executive Assistant	Executive Assistant	Retirement Executive Secretary
Retirement	Top Step	\$ 7,586	\$ 5,924	\$ 5,924	\$ 6,399	\$ 7,214	\$ 7,586	\$ 9,532	\$ 9,518	\$ 9,532	\$ 10,045	\$ 6,367	\$ 7,450
	PEPRA	1.62% @65	2% @62	2% @62	2% @62	2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67	2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 553	\$ 492	\$ 492	\$ 507	\$ 563	\$ 553	\$ 515	\$ 879	\$ 515	\$ 724	\$ 774	\$ 548
	Social Security		\$ 367	\$ 367									
Insurance	Deferred Compensation	\$ 152			\$ 192		\$ 152		\$ 381		\$ 854		
	Other Ret.												
	Cafeteria				\$ 2,130				\$ 2,431			\$ 1,958	\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,632		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
Leaves	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52						
	Vacation	\$ 438	\$ 342	\$ 342	\$ 455	\$ 430	\$ 438	\$ 623	\$ 549	\$ 623	\$ 580	\$ 539	\$ 430
	Holidays	\$ 350	\$ 273	\$ 273	\$ 346	\$ 388	\$ 350	\$ 550	\$ 476	\$ 550	\$ 580	\$ 294	\$ 401
	Admin Leave				\$ 194			\$ 183		\$ 183	\$ 386	\$ 73	
Allow	Auto												
Benefit Package Total		\$ 3,650	\$ 4,009	\$ 4,009	\$ 3,825	\$ 3,562	\$ 3,650	\$ 4,224	\$ 4,716	\$ 4,224	\$ 4,797	\$ 3,639	\$ 3,402



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Human Resources Technician	Personnel Technician II	Personnel Technician II (Specialist)	Human Resources Technician	Human Resources Technician	N/C	Management Aide	Senior Human Resources Assistant, LACERA	Management Aide	Human Resources Technician	Personnel Assistant II	Human Resources Assistant
	<b>Top Step</b>	proposed	\$ 5,600	\$ 5,600	\$ 6,399	\$ 7,284		\$ 7,433	\$ 7,348	\$ 7,433	\$ 6,398	\$ 5,735	\$ 5,467
<b>Retirement</b>	PEPRA		2%@62	2%@62	2%@62	2%@62		2%@63	2.3%@65	2%@63	2.5%@67	2.6%@65	1.62%@65
	Employee Cost Share												
	Employer Normal Cost		\$ 465	\$ 465	\$ 507	\$ 569		\$ 401	\$ 679	\$ 401	\$ 461	\$ 697	\$ 402
	Social Security		\$ 347	\$ 347									
	Deferred Compensation								\$ 294		\$ 416		
	Other Ret.												
<b>Insurance</b>	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 2,023
	Health		\$ 2,262	\$ 2,262		\$ 2,050		\$ 2,296		\$ 2,296	\$ 1,632		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.		\$ 165	\$ 165									
<b>Leaves</b>	Vacation		\$ 323	\$ 323	\$ 369	\$ 434		\$ 486	\$ 424	\$ 486	\$ 369	\$ 485	\$ 315
	Holidays		\$ 258	\$ 258	\$ 305	\$ 392		\$ 429	\$ 367	\$ 429	\$ 369	\$ 265	\$ 294
	Admin Leave							\$ 143		\$ 143	\$ 246	\$ 66	
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		<b>\$ 0</b>	<b>\$ 3,928</b>	<b>\$ 3,928</b>	<b>\$ 3,276</b>	<b>\$ 3,575</b>	<b>\$ 0</b>	<b>\$ 3,812</b>	<b>\$ 4,195</b>	<b>\$ 3,812</b>	<b>\$ 3,535</b>	<b>\$ 3,472</b>	<b>\$ 3,035</b>



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Information Technology Supervisor	Information Technology Supervisor II	Information Technology Supervisor II	Information Technology Supervisor	Information Technology Infrastructure Supervisor	N/C	Systems Administrator	Data Systems Supervisor I, LACERA	Systems Administrator	Information Security Supervisor	N/C	N/C
	<b>Top Step</b>	proposed	\$ 11,063	\$ 11,063	\$ 9,162	\$ 13,811		\$ 13,937	\$ 12,361	\$ 13,937	\$ 12,915		
<b>Retirement</b>	PEPRA		2% @ 62	2% @ 62	2% @ 62	2% @ 62		2% @ 63	2.3% @ 65	2% @ 63	2.5% @ 67		
	Employee Cost Share												
	Employer Normal Cost		\$ 919	\$ 919	\$ 727	\$ 1,079		\$ 753	\$ 1,142	\$ 753	\$ 931		
	Social Security		\$ 686	\$ 686									
	Deferred Compensation								\$ 494		\$ 129		
	Other Ret.												
<b>Insurance</b>	Cafeteria		\$ 2,262	\$ 2,262	\$ 2,110				\$ 2,431				
	Health					\$ 2,050		\$ 2,296		\$ 2,296	\$ 1,823		
	Dental					\$ 130		\$ 47		\$ 47	\$ 21		
	Vision							\$ 10		\$ 10	\$ 21		
	Other Ins.								\$ 57				
<b>Leaves</b>	Vacation		\$ 702	\$ 702	\$ 599	\$ 823		\$ 911	\$ 713	\$ 911	\$ 745		
	Holidays		\$ 511	\$ 511	\$ 476	\$ 697		\$ 804	\$ 618	\$ 804	\$ 745		
	Admin Leave				\$ 198	\$ 531		\$ 268		\$ 268			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 0	\$ 5,080	\$ 5,080	\$ 4,110	\$ 5,310	\$ 0	\$ 5,088	\$ 5,455	\$ 5,088	\$ 4,414	\$ 0	\$ 0



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Infrastructure Engineer II	Information Technology Specialist I	Information Technology Specialist I	System Analyst	Network Specialist/WAN Systems Administrator	[IT Network Engineer II/ IT Systems Engineer II]	Systems Analyst	Data Systems Analyst II, LACERA	Systems Analyst	Information Systems Engineer	Information Systems Analyst II	Retirement Technology Systems Specialist
<b>Retirement</b>	<b>Top Step</b>	\$ 9,866	\$ 10,230	\$ 10,230	\$ 9,727	\$ 10,059	\$ 9,866	\$ 10,437	\$ 10,901	\$ 10,437	\$ 10,587	\$ 8,202	\$ 10,494
	PEPRA	1.62% @ 65	2% @ 62	2% @ 62	2% @ 62	2% @ 62	1.62% @ 65	2% @ 63	2.3% @ 65	2% @ 63	2.5% @ 67	2.6% @ 65	1.62% @ 65
	Employee Cost Share												
	Employer Normal Cost	\$ 719	\$ 850	\$ 850	\$ 771	\$ 786	\$ 719	\$ 564	\$ 1,007	\$ 564	\$ 763	\$ 997	\$ 771
	Social Security		\$ 634	\$ 634									
<b>Insurance</b>	Deferred Compensation	\$ 197			\$ 292		\$ 197		\$ 436		\$ 106		
	Other Ret.												
	Cafeteria				\$ 2,130				\$ 2,431			\$ 2,125	\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
<b>Leaves</b>	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
	Vacation	\$ 569	\$ 590	\$ 590	\$ 692	\$ 600	\$ 569	\$ 682	\$ 629	\$ 682	\$ 611	\$ 694	\$ 686
	Holidays	\$ 455	\$ 472	\$ 472	\$ 526	\$ 503	\$ 455	\$ 602	\$ 545	\$ 602	\$ 611	\$ 379	\$ 565
	Admin Leave				\$ 295			\$ 201		\$ 201		\$ 95	
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 4,098	\$ 5,081	\$ 5,081	\$ 4,706	\$ 4,068	\$ 4,098	\$ 4,401	\$ 5,104	\$ 4,401	\$ 3,955	\$ 4,290	\$ 4,045



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		IT Technician II	Information Technology Technician	Information Systems Technician	Information Technology Specialist	Information Technology Support Technician II	IT Systems Technician II	Computer Operator	Systems Aid, LACERA	Computer Operator	Information Systems Technician	Information Systems Technician	Information Technology Specialist
Retirement	Top Step	\$ 7,739	\$ 6,420	\$ 5,592	\$ 8,089	\$ 7,504	\$ 7,739	\$ 6,798	\$ 5,988	\$ 6,798	\$ 7,797	\$ 6,446	\$ 7,505
	PEPRA	1.62% @ 65	2% @ 62	2% @ 62	2% @ 62	2% @ 62	1.62% @ 65	2% @ 63	2.3% @ 65	2% @ 63	2.5% @ 67	2.6% @ 65	1.62% @ 65
	Employee Cost Share												
	Employer Normal Cost	\$ 564	\$ 534	\$ 465	\$ 641	\$ 586	\$ 564	\$ 367	\$ 553	\$ 367	\$ 562	\$ 784	\$ 552
	Social Security		\$ 398	\$ 347									
Insurance	Deferred Compensation	\$ 155					\$ 155		\$ 240		\$ 78		
	Other Ret.												
	Cafeteria				\$ 2,110				\$ 2,431			\$ 2,125	\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
Leaves	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
	Vacation	\$ 447	\$ 370	\$ 323	\$ 529	\$ 447	\$ 447	\$ 445	\$ 345	\$ 445	\$ 450	\$ 545	\$ 491
	Holidays	\$ 357	\$ 296	\$ 258	\$ 420	\$ 375	\$ 357	\$ 392	\$ 299	\$ 392	\$ 450	\$ 298	\$ 404
	Admin Leave				\$ 175			\$ 131		\$ 131		\$ 74	
Allow	Auto												
Benefit Package Total		\$ 3,680	\$ 4,132	\$ 3,926	\$ 3,875	\$ 3,589	\$ 3,680	\$ 3,687	\$ 3,925	\$ 3,687	\$ 3,404	\$ 3,826	\$ 3,470



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Office Assistant	Office Assistant (General)	Office Assistant	Office Assistant	Senior Office Assistant	Office Technician	Administrative Clerk	[Intermediate Typist Clerk, LACERA/ Receptionist, LACERA]	Administrative Clerk	[Receptionist/ Office Specialist]	Clerical Assistant II	Office Assistant
	<b>Top Step</b>	\$ 4,304	\$ 4,230	\$ 4,230	\$ 4,791	\$ 5,683	\$ 4,304	\$ 7,176	\$ 4,916	\$ 7,176	\$ 5,795	\$ 4,441	\$ 4,082
Retirement	PEPRA	1.62% @65	2% @62	2% @62	2% @62	2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67	2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 314	\$ 352	\$ 352	\$ 380	\$ 444	\$ 314	\$ 387	\$ 454	\$ 387	\$ 418	\$ 540	\$ 300
	Social Security		\$ 262	\$ 262									
	Deferred Compensation	\$ 86					\$ 86		\$ 197		\$ 58		
Insurance	Other Ret.												
	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 1,925
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
Leaves	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
	Vacation	\$ 248	\$ 244	\$ 244	\$ 276	\$ 339	\$ 248	\$ 469	\$ 284	\$ 469	\$ 334	\$ 376	\$ 236
	Holidays	\$ 199	\$ 195	\$ 195	\$ 228	\$ 284	\$ 199	\$ 414	\$ 246	\$ 414	\$ 334	\$ 205	\$ 220
	Admin Leave							\$ 138		\$ 138		\$ 51	
Allow	Auto												
Benefit Package Total		\$ 3,004	\$ 3,587	\$ 3,587	\$ 2,979	\$ 3,247	\$ 3,004	\$ 3,761	\$ 3,667	\$ 3,761	\$ 3,008	\$ 3,130	\$ 2,680



**Orange County Employees Retirement System**  
Benefit Detail  
April 2025

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Retirement Services Specialist II	Associate Government Program Analyst	Associate Government Program Analyst	N/C	N/C	Retirement Program Specialist	Benefits Specialist	Retirement Benefits Specialist II	Benefits Specialist	Retirement Specialist	N/C	Retirement Member Services Specialist
<b>Retirement</b>	<b>Top Step</b>	\$ 6,240	\$ 7,327	\$ 7,327			\$ 6,240	\$ 8,237	\$ 7,046	\$ 8,237	\$ 8,609		\$ 6,439
	PEPRA	1.62% @65	2% @62	2% @62			1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67		1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 455	\$ 609	\$ 609			\$ 455	\$ 445	\$ 651	\$ 445	\$ 621		\$ 473
	Social Security		\$ 454	\$ 454									
<b>Insurance</b>	Deferred Compensation	\$ 125					\$ 125		\$ 282		\$ 86		
	Other Ret.												
	Cafeteria								\$ 2,431				\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262			\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99				\$ 47		\$ 47	\$ 21		
<b>Leaves</b>	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
	Vacation	\$ 360	\$ 423	\$ 423			\$ 360	\$ 539	\$ 406	\$ 539	\$ 497		\$ 372
	Holidays	\$ 288	\$ 338	\$ 338			\$ 288	\$ 475	\$ 352	\$ 475	\$ 497		\$ 347
	Admin Leave							\$ 158		\$ 158			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 3,385	\$ 4,358	\$ 4,358	\$ 0	\$ 0	\$ 3,385	\$ 3,969	\$ 4,179	\$ 3,969	\$ 3,564	\$ 0	\$ 3,215



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Retirement Services Supervisor	Pension Program Manager I	Pension Program Manager I	N/C	N/C	Retirement Benefits Program Supervisor	Senior Benefits Analyst	Senior Retirement Benefits Specialist	Senior Benefits Analyst	Retirement Specialist Supervisor	N/C	[Retirement Member Services Senior Specialists/ Retirement Member Services Manager]
	<b>Top Step</b>	\$ 7,929	\$ 8,710	\$ 8,710			\$ 7,929	\$ 13,358	\$ 9,755	\$ 13,358	\$ 13,567		\$ 10,046
<b>Retirement</b>	PEPRA	1.62% @65	2% @62	2% @62			1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67		1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 578	\$ 724	\$ 724			\$ 578	\$ 721	\$ 901	\$ 721	\$ 978		\$ 738
	Social Security		\$ 540	\$ 540									
	Deferred Compensation	\$ 159					\$ 159		\$ 390		\$ 136		
	Other Ret.												
<b>Insurance</b>	Cafeteria		\$ 2,262	\$ 2,262					\$ 2,431				\$ 2,023
	Health	\$ 2,105					\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental							\$ 47		\$ 47	\$ 21		
	Vision							\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52					\$ 52		\$ 57				
<b>Leaves</b>	Vacation	\$ 457	\$ 553	\$ 553			\$ 457	\$ 873	\$ 563	\$ 873	\$ 783		\$ 657
	Holidays	\$ 366	\$ 402	\$ 402			\$ 366	\$ 771	\$ 488	\$ 771	\$ 783		\$ 541
	Admin Leave							\$ 257		\$ 257			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		<b>\$ 3,717</b>	<b>\$ 4,480</b>	<b>\$ 4,480</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 3,717</b>	<b>\$ 4,975</b>	<b>\$ 4,829</b>	<b>\$ 4,975</b>	<b>\$ 4,543</b>	<b>\$ 0</b>	<b>\$ 3,959</b>





**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
Benchmark/ Comparator Agency Match		Retirement Services Technician I	Pension Program Representative	Pension Program Representative	N/C	N/C	Retirement Benefits Technician	N/C	Retirement Benefit Specialist I	N/C	Retirement Benefits Technician	Retirement Assistant	Retirement Member Services Associate
	<b>Top Step</b>	proposed	\$ 4,573	\$ 4,573			\$ 5,773		\$ 5,988		\$ 6,398	\$ 5,116	\$ 5,434
Retirement	PEPRA		2% @ 62	2% @ 62			1.62% @ 65		2.3% @ 65		2.5% @ 67	2.6% @ 65	1.62% @ 65
	Employee Cost Share												
	Employer Normal Cost		\$ 380	\$ 380			\$ 421		\$ 553		\$ 461	\$ 622	\$ 399
	Social Security		\$ 284	\$ 284									
	Deferred Compensation						\$ 115		\$ 240		\$ 64		
	Other Ret.												
Insurance	Cafeteria								\$ 2,431			\$ 1,958	\$ 2,023
	Health		\$ 2,262	\$ 2,262			\$ 2,105				\$ 1,823		
	Dental		\$ 99	\$ 99							\$ 21		
	Vision		\$ 8	\$ 8							\$ 21		
	Other Ins.		\$ 165	\$ 165			\$ 52		\$ 57				
Leaves	Vacation		\$ 264	\$ 264			\$ 333		\$ 345		\$ 369	\$ 433	\$ 314
	Holidays		\$ 211	\$ 211			\$ 266		\$ 299		\$ 369	\$ 236	\$ 293
	Admin Leave											\$ 59	
Allow	Auto												
Benefit Package Total		\$ 0	\$ 3,672	\$ 3,672	\$ 0	\$ 0	\$ 3,293	\$ 0	\$ 3,925	\$ 0	\$ 3,127	\$ 3,308	\$ 3,029



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Senior Software Engineer	Information Technology Specialist II	Information Technology Specialist II	N/C	Senior Programmer Analyst	Senior IT Applications Developer	Programmer Analyst IV	EDP Senior Programmer Analyst, LACERA	Programmer Analyst IV	Senior Business Systems Engineer	N/C	Retirement Business Systems Engineer
<b>Retirement</b>	<b>Top Step</b>	\$ 11,708	\$ 11,558	\$ 11,558		\$ 11,090	\$ 11,708	\$ 12,029	\$ 11,651	\$ 12,029	\$ 14,406		\$ 13,090
	PEPRA	1.62% @65	2% @62	2% @62		2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67		1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 853	\$ 960	\$ 960		\$ 866	\$ 853	\$ 650	\$ 1,077	\$ 650	\$ 1,039		\$ 962
	Social Security		\$ 717	\$ 717									
<b>Insurance</b>	Deferred Compensation	\$ 234					\$ 234		\$ 466		\$ 144		
	Other Ret.												
	Cafeteria								\$ 2,431				\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
<b>Leaves</b>	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165		\$ 52			\$ 57				
	Vacation	\$ 675	\$ 667	\$ 667		\$ 661	\$ 675	\$ 786	\$ 672	\$ 786	\$ 831		\$ 856
	Holidays	\$ 540	\$ 533	\$ 533		\$ 555	\$ 540	\$ 694	\$ 583	\$ 694	\$ 831		\$ 705
	Admin Leave							\$ 231		\$ 231			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 4,461	\$ 5,411	\$ 5,411	\$ 0	\$ 4,262	\$ 4,461	\$ 4,714	\$ 5,285	\$ 4,714	\$ 4,709	\$ 0	\$ 4,546



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Software Engineer	Information Technology Specialist I	Information Technology Specialist I	N/C	Programmer Analyst	IT Applications Developer II	Programmer Analyst II	EDP Programmer Analyst, LACERA	Programmer Analyst II	Business Systems Engineer	N/C	Retirement Technology Systems Specialist
<b>Retirement</b>	<b>Top Step</b>	\$ 10,219	\$ 10,230	\$ 10,230		\$ 10,059	\$ 10,219	\$ 10,177	\$ 10,174	\$ 10,177	\$ 12,743		\$ 10,494
	PEPRA	1.62% @65	2% @62	2% @62		2% @62	1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67		1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 745	\$ 850	\$ 850		\$ 786	\$ 745	\$ 550	\$ 940	\$ 550	\$ 919		\$ 771
	Social Security		\$ 634	\$ 634									
<b>Insurance</b>	Deferred Compensation	\$ 204					\$ 204		\$ 407		\$ 127		
	Other Ret.												
	Cafeteria								\$ 2,431				\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262		\$ 2,050	\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,823		
	Dental		\$ 99	\$ 99		\$ 130		\$ 47		\$ 47	\$ 21		
<b>Leaves</b>	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165		\$ 52			\$ 57				
	Vacation	\$ 590	\$ 590	\$ 590		\$ 600	\$ 590	\$ 665	\$ 587	\$ 665	\$ 735		\$ 686
	Holidays	\$ 472	\$ 472	\$ 472		\$ 503	\$ 472	\$ 587	\$ 509	\$ 587	\$ 735		\$ 565
	Admin Leave							\$ 196		\$ 196			
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		<b>\$ 4,168</b>	<b>\$ 5,081</b>	<b>\$ 5,081</b>	<b>\$ 0</b>	<b>\$ 4,068</b>	<b>\$ 4,168</b>	<b>\$ 4,350</b>	<b>\$ 4,930</b>	<b>\$ 4,350</b>	<b>\$ 4,380</b>	<b>\$ 0</b>	<b>\$ 4,045</b>



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Staff Specialist	Staff Services Analyst	Staff Services Analyst	Administrative Specialist	N/C	Staff Specialist	Management Assistant	Staff Assistant II, LACERA	Management Assistant	Senior Executive Secretary	Administrative Aide II	Retirement Administrative Secretary
	<b>Top Step</b>	\$ 7,096	\$ 6,093	\$ 6,093	\$ 6,087		\$ 7,096	\$ 7,433	\$ 7,624	\$ 7,433	\$ 9,197	\$ 6,322	\$ 5,434
<b>Retirement</b>	PEPRA	1.62% @65	2% @62	2% @62	2% @62		1.62% @65	2% @63	2.3% @65	2% @63	2.5% @67	2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 517	\$ 506	\$ 506	\$ 483		\$ 517	\$ 401	\$ 704	\$ 401	\$ 663	\$ 769	\$ 399
	Social Security		\$ 378	\$ 378									
	Deferred Compensation	\$ 142					\$ 142		\$ 305		\$ 598		
	Other Ret.												
<b>Insurance</b>	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 2,023
	Health	\$ 2,105	\$ 2,262	\$ 2,262			\$ 2,105	\$ 2,296		\$ 2,296	\$ 1,632		
	Dental		\$ 99	\$ 99				\$ 47		\$ 47	\$ 21		
	Vision		\$ 8	\$ 8				\$ 10		\$ 10	\$ 21		
	Other Ins.	\$ 52	\$ 165	\$ 165			\$ 52		\$ 57				
<b>Leaves</b>	Vacation	\$ 409	\$ 352	\$ 352	\$ 351		\$ 409	\$ 486	\$ 440	\$ 486	\$ 531	\$ 535	\$ 314
	Holidays	\$ 328	\$ 281	\$ 281	\$ 290		\$ 328	\$ 429	\$ 381	\$ 429	\$ 531	\$ 292	\$ 293
	Admin Leave							\$ 143		\$ 143	\$ 354	\$ 73	
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		\$ 3,553	\$ 4,051	\$ 4,051	\$ 3,219	\$ 0	\$ 3,553	\$ 3,812	\$ 4,318	\$ 3,812	\$ 4,349	\$ 3,627	\$ 3,029



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Support Services Assistant	Materials and Stores Specialist	Materials and Stores Specialist	Stock Clerk	Stock Clerk	Store Clerk	N/C	Procurement and Supply Clerk, LACERA	N/C	N/C	Stock Clerk	Stock Clerk
<b>Retirement</b>	<b>Top Step</b>	\$ 4,676	\$ 5,306	\$ 5,306	\$ 5,011	\$ 6,143	\$ 4,676		\$ 5,657			\$ 4,054	\$ 4,131
	PEPRA	1.62% @65	2% @62	2% @62	2% @62	2% @62	1.62% @65		2.3% @65			2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 341	\$ 441	\$ 441	\$ 397	\$ 480	\$ 341		\$ 523			\$ 493	\$ 304
	Social Security		\$ 329	\$ 329									
	Deferred Compensation	\$ 94					\$ 94		\$ 226				
<b>Insurance</b>	Other Ret.												
	Cafeteria				\$ 2,095				\$ 2,431			\$ 1,958	\$ 1,925
	Health	\$ 2,105	\$ 2,097	\$ 2,097		\$ 2,050	\$ 2,105						
	Dental		\$ 99	\$ 99		\$ 130							
	Vision		\$ 8	\$ 8									
	Other Ins.	\$ 52					\$ 52		\$ 57				
<b>Leaves</b>	Vacation	\$ 270	\$ 306	\$ 306	\$ 289	\$ 366	\$ 270		\$ 326			\$ 343	\$ 238
	Holidays	\$ 216	\$ 245	\$ 245	\$ 239	\$ 307	\$ 216		\$ 283			\$ 187	\$ 222
	Admin Leave											\$ 47	
<b>Allow</b>	Auto												
<b>Benefit Package Total</b>		<b>\$ 3,077</b>	<b>\$ 3,525</b>	<b>\$ 3,525</b>	<b>\$ 3,020</b>	<b>\$ 3,333</b>	<b>\$ 3,077</b>	<b>\$ 0</b>	<b>\$ 3,845</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 3,028</b>	<b>\$ 2,689</b>



**Orange County Employees Retirement System**  
**Benefit Detail**  
**April 2025**

Agency		Orange County Employees Retirement System	California Public Employees Retirement System	California State Teachers' Retirement System	City of Orange	City of Santa Ana	County of Orange	Los Angeles City Employees' Retirement System	Los Angeles County Employees Retirement Association	Los Angeles Fire and Police Pensions	San Bernardino County Employees' Retirement Association	San Diego City Employees' Retirement System	San Diego County Employees Retirement Association
<b>Benchmark/ Comparator Agency Match</b>		Training Specialist	Training Officer II	Training Officer II	N/C	Organizational Training and Development Analyst	Staff Development Specialist	N/C	Training Coordinator, LACERA	N/C	N/C	Trainer	Staff Development Specialist
<b>Retirement</b>	<b>Top Step</b>	\$ 7,719	\$ 8,650	\$ 8,650		\$ 8,897	\$ 7,719		\$ 9,828			\$ 7,299	\$ 7,753
	PEPRA	1.62% @65	2% @62	2% @62		2% @62	1.62% @65		2.3% @65			2.6% @65	1.62% @65
	Employee Cost Share												
	Employer Normal Cost	\$ 563	\$ 719	\$ 719		\$ 695	\$ 563		\$ 908			\$ 888	\$ 570
	Social Security		\$ 536	\$ 536									
<b>Insurance</b>	Deferred Compensation	\$ 154					\$ 154		\$ 393				
	Other Ret.												
	Cafeteria		\$ 2,262	\$ 2,262					\$ 2,431			\$ 1,958	\$ 2,023
	Health	\$ 2,105				\$ 2,050	\$ 2,105						
	Dental					\$ 130							
<b>Leaves</b>	Vision												
	Other Ins.	\$ 52					\$ 52						
	Vacation	\$ 445	\$ 549	\$ 549		\$ 530	\$ 445		\$ 567			\$ 618	\$ 507
	Holidays	\$ 356	\$ 399	\$ 399		\$ 479	\$ 356		\$ 491			\$ 337	\$ 417
<b>Allow</b>	Admin Leave											\$ 84	
	Auto												
<b>Benefit Package Total</b>		<b>\$ 3,676</b>	<b>\$ 4,465</b>	<b>\$ 4,465</b>	<b>\$ 0</b>	<b>\$ 3,884</b>	<b>\$ 3,676</b>	<b>\$ 0</b>	<b>\$ 4,790</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 3,885</b>	<b>\$ 3,517</b>

## Appendix III

### Additional Benefits Information



**OCERS**  
**Survey of Additional Benefits**  
**April 2025**

**Health Plans & Costs**

Agency	Health Plan	Family		
		Employer Contribution	Employee Contribution	Total
OCERS (County of Orange)	Cigna Choice HMO	\$2,105	\$693	\$2,798
	Dental	provided through bargaining unit		
	Vision	provided through bargaining unit		
CalPERS*	Anthem Blue Cross HMO	\$2,262	\$394	\$2,656
	Delta Dental PPO	\$93	\$31	\$124
	VSP Basic	\$8	\$0	\$8
CalSTRS*	Anthem Blue Cross HMO	\$2,262	\$394	\$2,656
	Delta Dental PPO	\$93	\$31	\$124
	VSP Basic	\$8	\$0	\$8
City of Orange*	Blue Shield Access+	\$2,095	\$371	\$2,466
	Delta Care HMO	\$0	\$52	\$52
	EyeMed	\$0	\$16	\$16
City of Santa Ana	Kaiser	\$2,050	\$405	\$2,455
	Delta Dental PPO	\$130	unconfirmed	\$130
	Plan Name #4	\$0	unconfirmed	unconfirmed
LA City Employes Retirement System	Kaiser HMO	\$2,296	\$0	\$2,296
	Delta Dental PPO	\$47	\$96	\$143
	Blue View Vision	\$10	\$0	\$10





**OCERS**  
**Survey of Additional Benefits**  
**April 2025**

Agency	Health Plan	Family		
		Employer Contribution	Employee Contribution	Total
LA County Employees Retirement Association*	UnitedHealthcare HMO	\$2,430	\$7	\$2,437
	Delta Dental PPO	\$0	\$82	\$82
	Vision	incl w/medical	\$0	incl w/medical
LA Fire and Police Pension	Kaiser HMO	\$2,296	\$0	\$2,296
	Delta Dental PPO	\$47	\$96	\$143
	Blue View Vision	\$10	\$0	\$10
San Bernardino County Employees Retirement Association (SBCERA)	Kaiser	\$1,823	\$470	\$2,293
	Delta Dental PPO	\$21	\$130	\$151
	Vision	\$21	\$0	\$21
San Diego City Employee Retirement System (SDCERS)*	Sharp Classic HMO	\$1,958	\$291	\$2,249
	MetLife Dental HMO	\$0	\$133	\$133
	Plan Name #4	\$0	\$60	\$60
San Diego County Retirement Association (SDCERA)*	UnitedHealthcare Signature Value HMO	\$1,925	\$629	\$2,554
	Delta Dental PPO	\$0	\$148	\$148
	VSP Vision Service Plan	\$0	\$31	\$31



**OCERS**  
**Survey of Additional Benefits**  
**April 2025**

**Vacation & Holiday Hours**

Agency	Bargaining Unit	Vacation/PTO						Holidays (Observed + Floating)
		After 1 Year	After 5 Years	After 10 Years	After 15 Years	After 20 Years	After 25 Years	
OCERS (County of Orange)	OCEA (General Unit & Office Services)	80	120	160	160	160	160	12 days
CalPERS*	SEIU	132	168	192	204	216	216	11 days + 1 floating
CalSTRS*	SEIU	132	168	192	204	216	216	11 days + 1 floating
City of Orange	OMEA- Orange Municipal Employees' Association	80	120	128	164	184	200	10 days + 1 floating
City of Santa Ana	SEIU FT	80	124	144	168	200	200	12 days + 1 floating
Los Angeles City Employees Retirement System (LACERS)	All Units	88	136	136	168	192	200	13 days + 2 floating
Los Angeles County Employees Retirement Association (LACERA)	LACERA Administrative, Technical, Clerical and Blue Collar Unit (850)	80	120	136	160	160	160	13 days
LA Fire and Police Pension	All Units	88	136	136	168	192	200	13 days + 2 floating
San Bernardino County Employees Retirement Association (SBCERA)	SEIU- General Benefit Group	80	120	160	160	160	160	14 days + 1 floating
San Diego City Employee Retirement System (SDCERS)*	Municipal Employees Association (MEA)	136	176	176	176	216	216	11 days + 1 floating
San Diego County Retirement Association (SDCERA)	CEM/ MA	96	136	136	176	176	176	12 days + 2 floating
	SEIU-AE/CL	80	120	120	160	160	160	

\* Annual Leave Program (combined vacation & sick leave)

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Insurance | Risk Management | Consulting



## Memorandum

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**DATE:** June 25, 2025  
**TO:** Members of the Personnel Committee  
**FROM:** Steve Delaney, Chief Executive Officer, OCERS  
**SUBJECT:** 2025 CAREER LADDER – CHIEF INFORMATION SECURITY OFFICER (CISO)

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### Recommendation

Approve the creation of a career ladder for a Chief Information Security Officer (CISO).

### Background

Talent Management is part of the OCERS Strategic Plan with a goal to recruit, retain and inspire a high performing workforce. A strategy that was implemented several years ago was to create career ladder positions that can be utilized as a tool for retention of high performing staff. A career ladder position is created with the approval of an additional classification without an increase in total headcount. The career ladder is used when an employee in the base position has demonstrated consistent performance that exceeds expectations, increased job knowledge and skills, and the ability to progress into the next level of job duties and responsibilities.

OCERS continues to modernize its infrastructure and implement large-scale initiatives such as the OCERS Horizon Pension Administration System (PAS) project, which introduces increased risk exposure, third-party vendor involvement, and more complex security requirements. With the growing volume of digital transactions, cloud-based services, and evolving threats, a rise in workload is anticipated in areas such as security governance, threat detection and mitigation, audit readiness, and regulatory compliance.

As OCERS advances towards Vision 2030, it has become clear that establishing a defined career path from Director of Information Security to CISO would better serve all departments by not only enhancing the organization's security framework but also supporting leadership development and long-term succession planning.

### Budget Impact

The Director of Information Security is currently classified as an OCERS-direct position with an annual salary range of \$151,382 - \$234,642. If approved, the proposed CISO position would also be an OCERS-direct position with an adjusted annual salary range of \$162,735 - \$252,239. This reflects an increase of **\$11,353 to \$17,597** over the current range, excluding benefits.

Assuming a 5% salary increase upon promotion of the current Director of Information Security, the estimated annual increase in salary and benefits is approximately **\$16,000**. With an anticipated promotion date in Q3 2025, the estimated budget impact for calendar year 2025 budget is approximately **\$8,000**:



## Memorandum

Current Position	Career Ladder Position	Department	Position Type	Current Salary and Benefits	Proposed Salary and Benefits	Total Annual Budget Impact	2025 Budget Impact
Director of Information Security	CISO	Information Security	OCERS-Direct	\$357,334	\$373,660	\$16,326	\$8,163

This position will report directly to the Chief Technology Officer. See the attached proposed organizational chart.

### Conclusion

Creating a career ladder for the Director of Information Security to CISO enables OCERS to address current and future information security challenges with the appropriate level of leadership and strategic foresight. This position is a critical step in building a resilient, secure, and forward-thinking organization. The annual cost for this career ladder is approximately **\$16,000**; the estimated budget impact for 2025 due to the timing of this promotion is **\$8,000**.




### Submitted by:

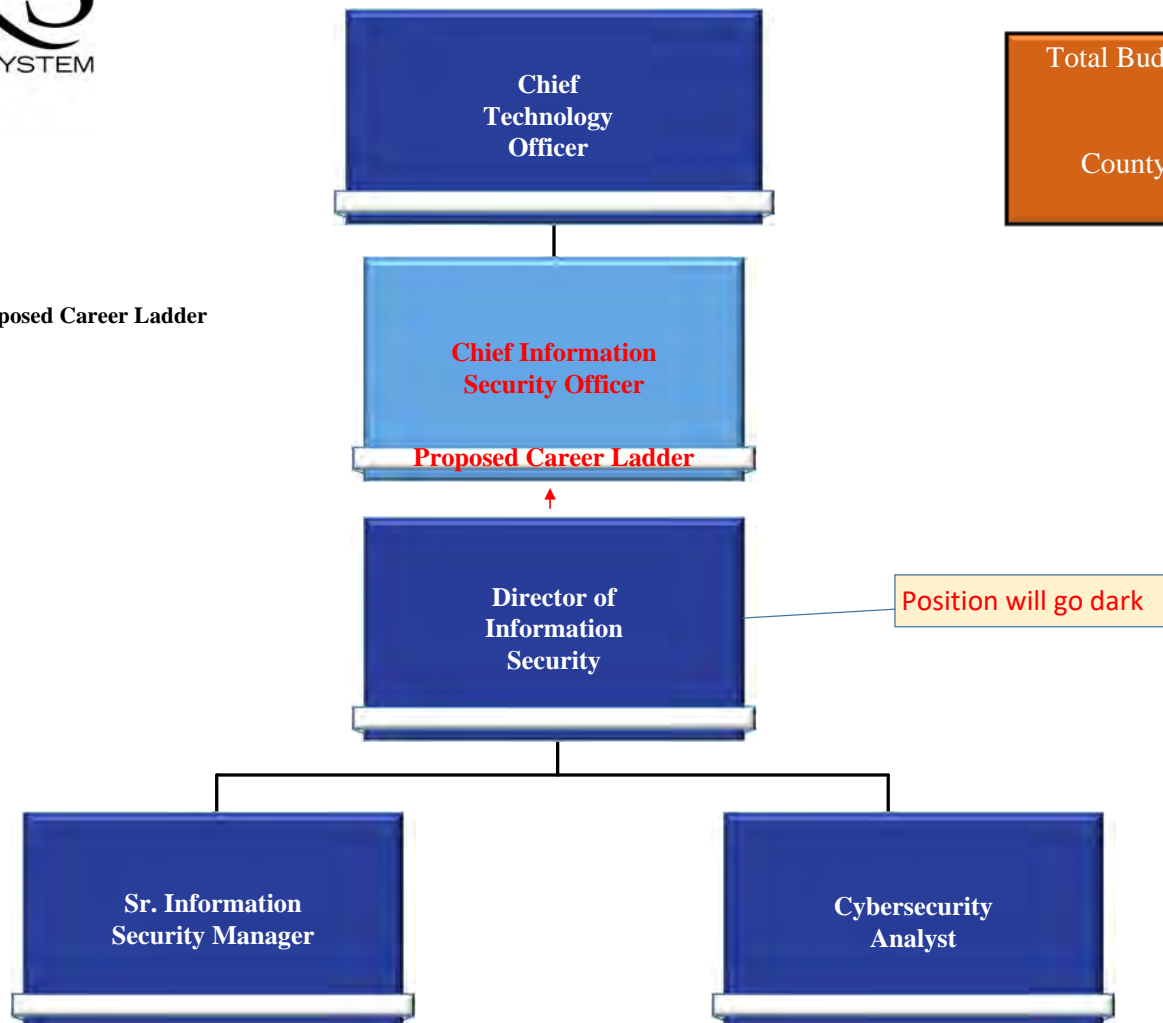


Steve Delaney  
Chief Executive Officer



## 2025 Proposed Information Security Organization Chart

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



Proposed Org Chart  
2025

Total Budgeted Information Security  
Employees  
: 3  
County – 0; OCERS Direct – 3

## Memorandum

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**DATE:** June 25, 2025  
**TO:** Members of the Personnel Committee  
**FROM:** Steve Delaney, Chief Executive Officer, and Ivan Cao, Staff Attorney for Investments  
**SUBJECT:** TRIENNIAL REVIEW OF THE COMPENSATION POLICY

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### Recommendation

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

### Discussion

The Board of Retirement ("Board") has established a review schedule that requires the review of every charter and policy every three years. Under the board-approved review process, the Personnel Committee will first review the Compensation Policy before presenting it to the Board for approval. The Board adopted the Compensation Policy on October 21, 2013, and most recently amended it on June 21, 2021.

### Incentive Compensation

The Board adopted the Incentive Compensation Policy on August 15, 2022. The proposed revisions to the Compensation Policy include incorporating the language of the Incentive Compensation Policy. The specific calculation elements of the Incentive Compensation Policy have been set forth in an Incentive Compensation Plan document, which will be included in the OCERS Employee Handbook. The revised Compensation Policy and the Incentive Compensation Plan will replace the Incentive Compensation Policy. Board approval is required for changes to the Incentive Compensation Plan.

The only change to the Incentive Compensation process is that the Compliance Department will validate the results instead of Internal Audit.

### Salary Compression Mitigation

The changes also include the staff's addition of salary compression mitigation language to support equitable and competitive compensation practices. The new provisions aim to address instances where minimal pay differences exist between executives or between supervisors and their subordinates despite significant differences in responsibility, experience, or accountability.

Key elements include:

- Monitoring and managing pay compression between the CEO and direct reports (e.g., Chief Officers, Directors, General Counsel), with a cap on executive base salaries at 90% of the CEO's base salary, excluding Investment Division personnel.
- Requiring Board review should an executive's salary exceed this 90% threshold, supported by market data analysis and internal equity considerations.
- Authorizing the Board to adjust the CEO's salary to maintain appropriate leadership pay differentials.
- Permitting the CEO to address agency-wide salary compression, to ensure supervisors earn at least 10% more than their highest-paid subordinates, where feasible.

- Mandating that all compression-related actions and decisions be documented and reported to the Board.

These changes aim to promote internal equity, support leadership retention, and maintain alignment with market standards.

### Certification Incentive Program

The Compensation Policy has also been revised to include the Certification Incentive Program as adopted by the Board. On November 13, 2017, the Board adopted the Certification Incentive Program to provide a salary increase of five and one-half percent (5.5%) to employees holding a CFA (Chartered Financial Analyst) or CPA (Certified Public Accountant) certification. On November 14, 2022, the Board expanded the Certification Incentive Program to include the following three certifications: (1) CISSP (Certified Information Systems Security Professional), (2) CIA (Certified Internal Auditor), and (3) SHRM -Senior Certified Professional.

The proposed revisions to the Policy also include non-substantive changes, consisting of minor edits aimed at eliminating unnecessary verbiage and typos and rephrasing the material to improve clarity and readability. The proposed revisions are set forth in underlined/strikeout text in the attached copy of the Compensation Policy. An unmarked version of the Policy is also attached for the Committee's ease of review. The Incentive Compensation Plan is also attached.

### Attachments

1. Compensation Policy – Redline
2. Compensation Policy – Clean
3. Incentive Compensation Plan

#### Submitted by:



**SD - Approved**

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Steve Delaney  
Chief Executive Officer

#### Submitted by:



**IC - Approved**

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Ivan Cao  
Staff Attorney for Investments





## OCERS Board Policy Compensation Policy

### Purpose and Background

1. This Compensation Policy applies to all employees employed directly by the Orange County Employees Retirement System ("OCERS"; "OCERS Direct Employee") and not to employees of the County of Orange who are assigned to work at OCERS.
2. The philosophy behind the Compensation Policy is to create and maintain a pay structure that attracts, develops, and retains strong leaders who model and promote OCERS' mission and values. This Compensation Policy is a management tool that, when aligned with an effective communication plan, will support, reinforce, and align OCERS' values, business strategy, operations, and financial needs and provide secure retirement benefits to OCERS members with the highest standards of excellence.

The goals of this Compensation Policy are to:

- a. Create and maintain a ~~pay structure that is competitive~~ competitive pay structure among OCERS' peers in the public pension community ~~and align, aligning~~ aligned with published market data for similarly sized governmental organizations.
- b. Recognize and reward individual performance, initiatives, growth in job proficiency, and achievement of stated goals.
- c. Provide management the flexibility to make compensation decisions within budgetary guidelines.
- d. Provide OCERS Direct Employees with some measure of predictability ~~with respect to both regarding~~ salary growth and rewards for superior performance.

In alignment with OCERS' culture, the ~~agency's~~ agency's goals ~~of the agency~~ and the design of the compensation program will be communicated openly to all OCERS Direct Employees. The compensation program is intended to be fair and straightforward so that all OCERS Direct Employees understand the goals of the process.

### Compensation Program

3. The OCERS Board of Retirement (Board) will approve a salary range for each OCERS Direct Employee position. Consistent with the goals of this Policy, the salary ranges will be competitive with OCERS' peers and aligned with published market data. The Board may direct the CEO to retain a compensation consultant ~~for purposes of obtaining~~ to obtain peer and market data and advice regarding OCERS' compensation program.
4. The CEO will be responsible for ensuring that the Board-approved salary ranges are reviewed at least every three years to ensure that they remain competitive, and will promptly inform the Board of the results of each such review. The CEO may retain a compensation consultant ~~for purposes of undertaking~~ to undertake this review. If the CEO believes adjustments to the salary

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## OCERS Board Policy Compensation Policy

ranges may be necessary, the CEO will promptly present ~~his or her~~their recommendations to the Board for the Board's approval of any adjustments to the salary ranges.

5. In each year in which salary ranges are not reviewed ~~in accordance with~~per Section 4, above, the salary ranges will be automatically increased by the amount, if any, of the increase in the Employer Cost Index for Salaries and Wages for the previous 12-month period, as published by the U.S. Department of Labor, Bureau of Labor Statistics.
  6. The CEO will be responsible for managing the salaries of the OCERS Direct Employees within the Board-approved salary ranges. The CEO will use the following process:
    - e. ~~►~~ In November of each year, or such other time of year as determined by the CEO, each OCERS Direct Employee ~~who was~~ employed by OCERS as of June 1 of that year will receive a written performance evaluation. Each OCERS Direct Employee's performance will be rated as Does Not Meet Expectations; Meets Expectations; Exceeds Expectations; or Exceptional. The CEO must concur in each performance rating.
    - f. ~~►~~ Employees who receive a performance rating of Meets Expectations or better will be eligible for a salary increase.
      - i. ~~►~~ Employees who receive a performance rating of Meets Expectations will receive a salary increase equal to the increase, if any, in the Employer Cost Index for Salaries and Wages for the previous 12-month period, as published by the U.S. Department of Labor, Bureau of Labor Statistics (~~"Base Increase"~~).
      - ii. ~~►~~ Employees who receive a performance rating of Exceeds Expectations will receive a salary increase equal to the Base Increase plus a merit increase equal to one step (Merit Step) up to the maximum amount of the salary range for the position, ~~after the salary range has been adjusted in accordance with Section 4 or 5, above.~~
      - iii. ~~►~~ Employees who receive a performance rating of Exceptional will receive a salary increase equal to the Base Increase plus a merit increase equal to two Merit Steps up to the maximum amount of the salary range for the position, ~~after the salary range has been adjusted in accordance with Section 4 or 5, above.~~
      - iv. ~~►~~ Each Merit Step is equal to 2.75%.
      - v. ~~►~~ No salaries will exceed the maximum amount of the salary range for the position after the salary range has been adjusted in accordance with Section 4 or 5, above. If an employee's salary increase under this provision would cause the employee's salary to exceed the maximum of the salary range for the position, the employee's salary will be limited to the maximum for the range, ~~and there will be no additional payments (by lump sum or otherwise) to the employee to make up the difference.~~
- ~~►~~ The salary increases described above are subject to compression per Sections 15-19

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## OCERS Board Policy Compensation Policy

below.

7. The Board has entered into a Memorandum of Agreement with the County of Orange ~~for providing and administering~~ to provide and administer employee benefits to OCERS Direct Employees. The agreement ~~with the County calls for~~ requires OCERS Direct Employees to receive the same benefits offered to County administrative and executive management employees.

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### Incentive Compensation Program

#### Purpose and Background

8. The Incentive Compensation Program aims to create and maintain a pay structure that attracts, develops, and retains strong leaders who achieve results and model and promote OCERS' mission and values. This Incentive Compensation Program consists of a performance-based, cash compensation program that, when aligned with a market-competitive salary compensation program, will support, reinforce, and align OCERS' values, business strategy, operations, and financial needs and, ultimately, provide secure retirement benefits to OCERS' members with the highest standards of excellence.
9. The goals of the Incentive Compensation Program are to:
- Ensure the long-term success and stability of the pension fund
  - Recruit and retain top talent
  - Build and maintain an engaged and motivated team
  - Create a natural alignment of interests
  - Improve succession planning
  - Enable employees to achieve and earn top-quartile pay for top-quartile results.
10. The Incentive Compensation Program elements, design, calculation, and details are set forth in the Incentive Compensation Plan.

Board approval is required for changes to the Incentive Compensation Plan.

#### Covered Positions and Participation

11. Recognizing that investment results are created through collective effort, the Program aims to reward all OCERS Direct Employees serving in the Investment Division ("Covered Employees"). The Incentive Compensation Program covers individuals with the job titles in the following table. They may participate in the Program and earn incentive pay up to the maximum of base salary indicated below:

<u>Position Title</u>	<u>Maximum % of Base Salary</u>
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## OCERS Board Policy Compensation Policy

<u>Chief Investment Officer</u>	<u>75%</u>
<u>Managing Director</u>	<u>45%</u>
<u>Director of Investments</u>	<u>40%</u>
<u>Senior Investment Officer</u>	<u>35%</u>
<u>Investment Officer</u>	<u>30%</u>
<u>Senior Investment Analyst</u>	<u>25%</u>
<u>Investment Analyst</u>	<u>20%</u>

### Eligible Employees

12. In order to receive incentive compensation for the calendar year, Covered Employees must meet all of the following three requirements:

- Achieve a "Meets Expectations" review as part of OCERS' annual performance evaluation process for the most recent calendar year of the measurement period.
- Serve as a Covered Employee in the OCERS' Investment Division for the full calendar year prior to the end of the computation period (e.g., Jan 1 through December 31).
- Continue to be employed as a Covered Employee in the OCERS' Investment Division at the time of payment.

### Third-Party Validation and Oversight

13. In order to ensure a fair, correct, and transparent process, several layers of oversight and validation are built into the Incentive Compensation Program process. Before any payments are confirmed or paid, the following steps will occur:

- a. OCERS' General/Risk Consultant will validate the OCERS' Total Plan Benchmark constitution and calculation.
- b. OCERS' Custodian will calculate and validate OCERS' portfolio returns.
- c. OCERS' General/Risk Consultant will calculate and provide Sharpe Ratio data relative to benchmark and peers.
- d. OCERS' CEO and CIO will review and approve all annual performance reviews for each Covered Employee and Eligible Employee.
- e. OCERS' Finance Department will calculate the annual incentive compensation awards for each Eligible Employee.
- f. OCERS' Compliance Department will validate the Program process and results.
- g. OCERS' CEO will have final approval of all incentive compensation awards and payments.

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## OCERS Board Policy Compensation Policy

### Salary Compression Mitigation

14. OCERS recognizes the importance of maintaining equitable and competitive compensation practices. Salary compression occurs when there is a minimal or no difference in pay between employees, regardless of differences in skills, experience, seniority, or responsibilities. OCERS is committed to ensuring that compensation among executive leadership reflects appropriate distinctions in scope of responsibility, accountability, and market competitiveness.

### Compression Review and Correction

15. The agency shall monitor and address compression between the Chief Executive Officer (CEO) and other executives to maintain equity and incentivize leadership retention. The salary differential between the CEO and direct reports (e.g., Chief Officers, Directors, General Counsel) should reasonably reflect differences in organizational leadership, strategic responsibility, and public accountability.
16. If a salary increase from the CEO review process described in Section 6 above would result in an executive (excluding Investment Department Personnel) receiving a base salary equal to 90% or more of the CEO's base salary, the increase will be capped at the 90% figure.
17. The Board will review salary compression when an executive's base salary (excluding Investment Department Personnel) exceeds 90% of the CEO's base salary. The Human Resources Department will assess executive pay differentials and provide the Board with comparative market compensation data for the CEO and the other executive positions. The Board will evaluate whether such compression reflects changes in market trends, reclassifications, or internal inequities.
18. Following its assessment, the Board may take corrective actions as appropriate. These actions may include:
- Adjusting the CEO's salary to restore an appropriate differential, and/or
  - Directing the CEO to review and adjust the salaries of affected executives whose compensation is above the 90% threshold.

Such decisions will be made in consideration of market competitiveness, internal equity, organizational structure, and the goal of retaining high-performing leadership.

19. The CEO will monitor and address pay compression issues agency-wide, especially when a subordinate employee's salary equals or exceeds that of their direct supervisor. To maintain appropriate salary relationships and acknowledge differences in responsibility, experience, and oversight, the CEO may, at their discretion, ensure that a supervisor's salary is at least 10% higher than that of their highest-paid direct report. Any adjustments to resolve pay compression will align with the performance-based salary increase process and stay within the Board-approved salary ranges and budget.
20. The CEO's corrective actions to address compression findings will be documented and reported to the Board.

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## OCERS Board Policy Compensation Policy

### Certification Incentive Program

21. OCERS has established a certification incentive program designed to reward OCERS Direct Employees holding specific professional certifications that enhance OCERS' operational capabilities and support its strategic goals.
22. OCERS Direct Employees who hold any of the following professional certifications are eligible to receive a salary increase of five and one-half percent (5.5%):
- CFA - Chartered Financial Analyst certification granted by the CFA Institute.
  - CIA - Certified Internal Auditor certification granted by the Institute of Internal Auditors.
  - CISSP - Certified Information Systems Security Professional certification granted by the International Information System Security Certification Consortium, also known as ISC2.
  - CPA - Certified Public Accountant certification granted by the American Institute of Certified Public Accountants, or
  - SHRM-SCP - Senior Certified Professional certification granted by the Society for Human Resource Management, also known as SHRM.
23. Under this certification incentive program, employees holding multiple eligible certifications shall not receive a salary increase exceeding five and one-half percent (5.5%).
24. The salary increase received by an employee under this certification incentive program is not subject to the maximum amount of salary range for the position described in Section 6 nor salary compression described in Sections 15-19.
25. Additionally, employees must satisfy the continuing education requirements established by the certifying organization for each certification to qualify for the salary increase under this policy. If a certification has no continuing education requirement, the employee must complete at least twenty (20) hours of continuing education annually. Documentation verifying compliance must be submitted to Human Resources no later than December 31<sup>st</sup> of each calendar year. Failure to provide documentation may result in suspension or removal of the incentive.

### History

7. This policy was adopted by the Board of Retirement on October 21, 2013, and revised on October 11, 2017, and June 21, 2021, and [date].

26.

### Secretary's Certificate

I, the undersigned, the duly appointed Secretary of the Orange County Employees Retirement System, hereby certify the adoption of this policy.

Ct   
At

Last Revised [date] June 21, 2021

6 of 7

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**OCERS Board Policy**  
**Compensation Policy**

Steve Delaney  
Secretary of the Board

6/21/2021  
Date



## OCERS Board Policy Compensation Policy

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### Purpose and Background

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The goals of this Compensation Policy are to:

- a. Create and maintain a competitive pay structure among OCERS' peers in the public pension community, aligning with published market data for similarly sized governmental organizations.
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- d. Provide OCERS Direct Employees with some measure of predictability regarding salary growth and rewards for superior performance.

In alignment with OCERS' culture, the agency's goals and the design of the compensation program will be communicated openly to all OCERS Direct Employees. The compensation program is intended to be fair and straightforward so that all OCERS Direct Employees understand the goals of the process.

### Compensation Program

3. The OCERS Board of Retirement (Board) will approve a salary range for each OCERS Direct Employee position. Consistent with the goals of this Policy, the salary ranges will be competitive with OCERS' peers and aligned with published market data. The Board may direct the CEO to retain a compensation consultant to obtain peer and market data and advice regarding OCERS' compensation program.
4. The CEO will be responsible for ensuring that the Board-approved salary ranges are reviewed at least every three years to ensure that they remain competitive and will promptly inform the Board of the results of each such review. The CEO may retain a compensation consultant to undertake this review. If the CEO believes adjustments to the salary ranges may be necessary,





## OCERS Board Policy Compensation Policy

the CEO will promptly present their recommendations to the Board for the Board's approval of any adjustments to the salary ranges.

5. In each year in which salary ranges are not reviewed per Section 4 above, the salary ranges will be automatically increased by the amount, if any, of the increase in the Employer Cost Index for Salaries and Wages for the previous 12-month period, as published by the U.S. Department of Labor, Bureau of Labor Statistics.
6. The CEO will be responsible for managing the salaries of the OCERS Direct Employees within the Board-approved salary ranges. The CEO will use the following process:
  - ▶ In November of each year, or such other time of year as determined by the CEO, each OCERS Direct Employee employed by OCERS as of June 1 of that year will receive a written performance evaluation. Each OCERS Direct Employee's performance will be rated as Does Not Meet Expectations; Meets Expectations; Exceeds Expectations; or Exceptional. The CEO must concur in each performance rating.
  - ▶ Employees who receive a performance rating of Meets Expectations or better will be eligible for a salary increase.
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    - Employees who receive a performance rating of Exceeds Expectations will receive a salary increase equal to the Base Increase plus a merit increase equal to one step (Merit Step) up to the maximum amount of the salary range for the position after the salary range has been adjusted in accordance with Section 4 or 5 above.
    - Employees who receive a performance rating of Exceptional will receive a salary increase equal to the Base Increase plus a merit increase equal to two Merit Steps up to the maximum amount of the salary range for the position after the salary range has been adjusted in accordance with Section 4 or 5 above.
    - Each Merit Step is equal to 2.75%.
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  - ▶ The salary increases described above are subject to compression per Sections 15-19 below.
7. The Board has entered into a Memorandum of Agreement with the County of Orange to



## OCERS Board Policy Compensation Policy

provide and administer employee benefits to OCERS Direct Employees. The agreement requires OCERS Direct Employees to receive the same benefits offered to County administrative and executive management employees.

### Incentive Compensation Program

#### Purpose and Background

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  - Recruit and retain top talent
  - Build and maintain an engaged and motivated team
  - Create a natural alignment of interests
  - Improve succession planning
  - Enable employees to achieve and earn top-quartile pay for top-quartile results.
10. The Incentive Compensation Program elements, design, calculation, and details are set forth in the Incentive Compensation Plan.

***Board approval is required for changes to the Incentive Compensation Plan.***

#### Covered Positions and Participation

11. Recognizing that investment results are created through collective effort, the Program aims to reward all OCERS Direct Employees serving in the Investment Division ("Covered Employees"). The Incentive Compensation Program covers individuals with the job titles in the following table. They may participate in the Program and earn incentive pay up to the maximum of base salary indicated below:

Position Title	Maximum % of Base Salary
Chief Investment Officer	75%
Managing Director	45%
Director of Investments	40%
Senior Investment Officer	35%



## OCERS Board Policy Compensation Policy

Investment Officer	30%
Senior Investment Analyst	25%
Investment Analyst	20%

### Eligible Employees

12. In order to receive incentive compensation for the calendar year, Covered Employees must meet all of the following three requirements:
- Achieve a “Meets Expectations” review as part of OCERS’ annual performance evaluation process for the most recent calendar year of the measurement period.
  - Serve as a Covered Employee in the OCERS’ Investment Division for the full calendar year prior to the end of the computation period (e.g., Jan 1 through December 31).
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### Third-Party Validation and Oversight

13. In order to ensure a fair, correct, and transparent process, several layers of oversight and validation are built into the Incentive Compensation Program process. Before any payments are confirmed or paid, the following steps will occur:
- a. OCERS’ General/Risk Consultant will validate the OCERS’ Total Plan Benchmark constitution and calculation.
  - b. OCERS’ Custodian will calculate and validate OCERS’ portfolio returns.
  - c. OCERS’ General/Risk Consultant will calculate and provide Sharpe Ratio data relative to benchmark and peers.
  - d. OCERS’ CEO and CIO will review and approve all annual performance reviews for each Covered Employee and Eligible Employee.
  - e. OCERS’ Finance Department will calculate the annual incentive compensation awards for each Eligible Employee.
  - f. OCERS’ Compliance Department will validate the Program process and results.
  - g. OCERS’ CEO will have final approval of all incentive compensation awards and payments.

## Salary Compression Mitigation

14. OCERS recognizes the importance of maintaining equitable and competitive compensation practices. Salary compression occurs when there is a minimal or no difference in pay between employees, regardless of differences in skills, experience, seniority, or responsibilities. OCERS is committed to ensuring that compensation among executive leadership reflects appropriate distinctions in scope of responsibility, accountability, and market competitiveness.



## OCERS Board Policy

# Compensation Policy

### Compression Review and Correction

15. The agency shall monitor and address compression between the Chief Executive Officer (CEO) and other executives to maintain equity and incentivize leadership retention. The salary differential between the CEO and direct reports (e.g., Chief Officers, Directors, General Counsel) should reasonably reflect differences in organizational leadership, strategic responsibility, and public accountability.
16. If a salary increase from the CEO review process described in Section 6 above would result in an executive (excluding Investment Department Personnel) receiving a base salary equal to 90% or more of the CEO's base salary, the increase will be capped at the 90% figure.
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18. Following its assessment, the Board may take corrective actions as appropriate. These actions may include:
  - Adjusting the CEO's salary to restore an appropriate differential, and/or
  - Directing the CEO to review and adjust the salaries of affected executives whose compensation is above the 90% threshold.
19. Such decisions will be made in consideration of market competitiveness, internal equity, organizational structure, and the goal of retaining high-performing leadership. The CEO will monitor and address pay compression issues agency-wide, especially when a subordinate employee's salary equals or exceeds that of their direct supervisor. To maintain appropriate salary relationships and acknowledge differences in responsibility, experience, and oversight, the CEO may, at their discretion, ensure that a supervisor's salary is at least 10% higher than that of their highest-paid direct report. Any adjustments to resolve pay compression will align with the performance-based salary increase process and stay within the Board-approved salary ranges and budget.
20. The CEO's corrective actions to address compression findings will be documented and reported to the Board.

### Certification Incentive Program

21. OCERS has established a certification incentive program designed to reward OCERS Direct Employees holding specific professional certifications that enhance OCERS' operational capabilities and support its strategic goals.
22. OCERS Direct Employees who hold any of the following professional certifications are eligible to receive a salary increase of five and one-half percent (5.5%):
  - CFA - Chartered Financial Analyst certification granted by the CFA Institute,



## OCERS Board Policy

# Compensation Policy

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- CIA - Certified Internal Auditor certification granted by the Institute of Internal Auditors,
  - CISSP - Certified Information Systems Security Professional certification granted by the International Information System Security Certification Consortium, also known as ISC2,
  - CPA - Certified Public Accountant certification granted by the American Institute of Certified Public Accountants, or
  - SHRM-SCP - Senior Certified Professional certification granted by the Society for Human Resource Management, also known as SHRM.
23. Under this certification incentive program, employees holding multiple eligible certifications shall not receive a salary increase exceeding five and one-half percent (5.5%).
24. The salary increase received by an employee under this certification incentive program is not subject to the maximum amount of salary range for the position described in Section 6 nor salary compression described in Sections 15-19.
25. Additionally, employees must satisfy the continuing education requirements established by the certifying organization for each certification to qualify for the salary increase under this policy. If a certification has no continuing education requirement, the employee must complete at least twenty (20) hours of continuing education annually. Documentation verifying compliance must be submitted to Human Resources no later than December 31<sup>st</sup> of each calendar year. Failure to provide documentation may result in suspension or removal of the incentive.

## History

26. This policy was adopted by the Board of Retirement on October 21, 2013, and revised on October 11, 2017, June 21, 2021, and **[date]**.

## Secretary's Certificate

I, the undersigned, the duly appointed Secretary of the Orange County Employees Retirement System, hereby certify the adoption of this policy.

Steve Delaney  
Secretary of the Board

\_\_\_\_\_

Date



## Incentive Compensation Plan

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### Purpose

1. The Incentive Compensation Plan sets forth the elements, design, calculation, and details of the Incentive Compensation Program described in the OCERS Compensation Policy. The Compensation Policy describes the list of covered positions and eligible employees. Changes to this Incentive Compensation Plan require approval by the Board of Retirement.

### Program Design and Benchmark

2. The Program is designed around three components: 1) total portfolio excess return (alpha) over a benchmark; 2) risk-adjusted return (Sharpe Ratio); and 3) employee performance, as shown in the chart below. For the alpha and Sharpe Ratio calculations, the OCERS' Total Fund Plan Benchmark serves as the relative comparison benchmark.
3. The measurement period is the prior three years ("Rolling 3-year Period") ending December 31. For example, on December 31, 2022, the measurement period would include performance results for the calendar years 2020, 2021, and 2022. All OCERS' portfolio results will be reflected as net of fees.
4. Portfolio Excess Return vs. Benchmark: eligible employees earn 10% of their maximum payout for each 25 basis points of alpha generated by the OCERS' Total Portfolio, up to 50% of the maximum payout.
5. Risk-adjusted return:
  - a. Sharpe Ratio exceeds Benchmark: eligible employees earn 10% of their maximum payout if the Sharpe Ratio of the OCERS' Total Portfolio exceeds that of the Benchmark (i.e., that a dollar of risk was invested more efficiently relative to an indexed portfolio).
  - b. Sharpe Ratio Peer Rank: eligible employees earn 10% of their maximum payout if the OCERS' Total Portfolio Sharpe Ratio exceeds the median Sharpe Ratio of the public pension peer group, with an additional 10% credited for a first quartile Sharpe Ratio, relative to peers.
6. Annual Employee Performance Appraisal: eligible employees earn 10% of their maximum payout for a rating of "Exceeds" on their annual review; they earn the full 20% of maximum for this component of the Program with a rating of "Exceptional."

### Incentive Calculation and Payment

7. The Incentive Compensation Program requires an annual calculation for the period ending December 31, with payments made in two tranches, Year 1 and Year 2. Once eligibility has been confirmed and the annual incentive compensation has been earned and calculated, the two payments for the Program are paid as follows:
  - Year 1: the first 50% of the annual award paid within 60 days of the calculation of the OCERS' Total Plan Benchmark and its rolling three-year returns (period ended December 31) and the availability of the relevant Sharpe ratio information.



## Incentive Compensation Plan

- Year 2: the remaining 50% of the annual award paid in the calendar year following the first payment, prior to March 31 of that year.
8. If a Covered Employee earns a promotion to another Covered Position during the most recent calendar year of the measurement period, the Covered Employee shall have their incentive compensation calculated to reflect the proportion of calendar days spent in each position.
  9. If an Eligible Employee takes a Leave of Absence, other than Annual Leave, during the most recent calendar year, then the annual incentive payment amount will be reduced by a percentage that reflects the amount of leave time taken during the year by the employee.

QUANTITATIVE COMPONENT (Rolling 3-year period, net of fees)	% of Incentive	% of Incentive
<b>Portfolio Excess Return vs Benchmark (Alpha)</b>		<b>0-50%</b>
0-25 bps	10%	
26-50 bps	+10%	
51-75 bps	+10%	
76-100 bps	+10%	
>101 bps	+10%	
<b>Risk Adjusted Return (Sharpe Ratio)</b>		<b>0-30%</b>
A) Portfolio Sharpe Exceeds Benchmark	10%	
B) Above Median Peer Rank	10%	
1 <sup>st</sup> Quartile Peer Rank	+10%	
<b>QUALITATIVE COMPONENT</b>		
<b>Annual Employee Performance Appraisal</b>		<b>0-20%</b>
Meets	0%	
Exceeds	10%	
Exceptional	20%	





## Memorandum

**DATE:** June 25, 2025  
**TO:** Members of the Personnel Committee  
**FROM:** David Kim, Assistant CEO, External Operations  
**SUBJECT:** **OCERS HORIZON LIMITED TERM STAFFING REQUEST**

### 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, or 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 these staffing changes is \$1,133,739. The estimated budget impact for 2025 due to Q4 hiring for several positions is \$97,140; however, we anticipate the estimated cost for the additional positions in 2025 can be absorbed within the existing 2025 budget.

### Background/Discussion

At the March Board meeting, the OCERS management team, in collaboration with Provaliant (our PAS implementation partner), discussed the need for additional staffing in anticipation of the upcoming PAS implementation. As OCERS' subject matter experts (SMEs) become fully dedicated to this multi-year effort, expected to span three to four years—it is essential to maintain existing operations and service levels through strategic backfilling.

As the PAS SMEs focus on the PAS implementation, OCERS must ensure there is a staffing plan in place to provide temporary backfill for the day-to-day operational responsibilities that the SMEs would normally handle. To address this need, OCERS recommends utilizing Limited Term (LT) employees throughout the project lifecycle. LT employees are in temporary positions with a defined start and end date, and no expectation of long-term funding. LT employees are subject to the same hiring standards as permanent employees and are entitled to full benefits. These positions are to be filled by external candidates.

In April, the Personnel Committee approved and recommended to the Board 22 Limited Term positions, resulting in a net increase of 9 full-time equivalents (FTEs). At that time, OCERS noted this was the first phase of staffing for the OCERS Horizon project, with additional requests forthcoming.



The next phase includes positions that require less onboarding time and were identified in April. These Limited Term roles are intended to provide temporary backfill for critical operational duties while SMEs focus on the PAS implementation.

Detailed Position Breakdown:

### **Disabilities**

#### **Retirement Program Specialist (1) – Q4 2025 Hire\***

- Develop estimate and final disability benefits

\* This allows for an internal filling of a previously approved Limited Term position, with no additional headcount.

### **Member Services**

#### **Accounting Technician (2) – Q4 2025 Hire**

- Review Service Credit Purchase (SCP) transactions
- Member contact and payment processing for SCP

#### **Retirement Benefits Technician (1) – Q4 2025 Hire**

- Processes Reciprocity and Non-Service Credit Purchase transactions

### **Finance**

#### **Accountant Auditor (1) – 2026 Hire**

- Process finance-related retiree payroll transactions

### **Information Technology**

#### **Business Systems Analyst (1) – 2026 Hire**

- Translate business needs into system requirements
- Ensure business readiness and process alignment
- Map current-state processes and workflows to align with OCERS Horizon

#### **Data Analyst (1) – 2026 Hire**

- Improve data quality and governance
- Data readiness for PAS transition
- Enhance operational analytics

#### **AI Automation Engineer (1) -2026 Hire**

- Enhance member experience and engagement
- Operational efficiency through intelligent automation
- Lead design of AI architecture and roadmap in alignment with OCERS Horizon

### **Conclusion:**

In summary, I am requesting 8 new Limited Term positions, resulting in eight (8) additional Limited Term headcounts to OCERS.

The total estimated annual personnel cost for these staffing changes is **\$1,133,739**. The estimated budget impact for 2025, due to the timing of hiring for several positions, is **\$97,140**; however, we anticipate the estimated cost for the additional positions in 2025 can be absorbed within the existing 2025 budget.

**Submitted by:**



**DK - Approved**

David Kim  
Assistant CEO, External Operations



# OCERS Horizon Limited Term Staffing Request

June 25, 2025

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



## Staffing for OCERS Horizon, Recap

### April Personnel Committee and Board meetings:

- Discussed additional staffing needs for system modernization – OCERS Horizon
- Reviewed various employment types to address needs for Horizon backfill
- Recommended following same approach as County of Orange to use Limited Term positions
- Approved 22 Limited Term positions
  - OCERS actively recruiting
  - Acknowledged to Committee that this was the first step and additional requests would follow

## OCERS Horizon Determining Additional Project Staffing Needs

- Second round of Limited Term position requests were known in April
  - Need less time to train to get up to speed, 3-6 months
- Actively manage project resource loads in coordination with project schedules
- Additional round of requests to be made after PAS vendor has been selected and specific needed technical skillsets and requirements are identified

## OCERS Horizon Team Additional Limited Term Positions Overview

### Disabilities - Q4 2025 Hire

Retirement Program Specialist (1)

### Member Services – Q4 2025 Hire

Accounting Technician (2)

Retirement Benefits Technician (1)

### Finance – 2026 Hire

Accountant Auditor (1)

### Information Technology – 2026 Hire

Business Systems Analyst (1)

Data Analyst (1)

AI Automation Engineer (1)

## Disabilities, Member Services, and Finance Limited Term Positions

### **Disabilities**

#### **Retirement Program Specialist\***

- Develop estimate and final disability benefits

\*Allows for an internal filling of a previously approved Limited Term position, with no additional headcount.

### **Member Services**

#### **Accounting Technician**

- Review Service Credit Purchase (SCP) transactions
- Member contact and payment processing for SCP

#### **Retirement Benefits Technician**

- Processes Reciprocity and Non-Service Credit Purchase transactions

### **Finance**

#### **Accountant Auditor**

- Process finance–related retiree payroll transactions

## Information Technology Limited Term Positions – Bridging the Gap

### Business Systems Analyst

- Translate business needs into system requirements
- Ensure business readiness and process alignment
- Map current-state processes and workflows to align with OCERS Horizon

### Data Analyst

- Improve data quality and governance
- Data readiness for PAS transition
- Enhance operational analytics

### AI Automation Engineer

- Enhance member experience and engagement
- Operational efficiency through intelligent automation
- Lead design of AI architecture and roadmap in alignment with OCERS Horizon



2025  
Budgeted  
Headcount

Approved Staffing Plan

135 Budgeted Headcount

123 Employees on Payroll

12 Vacant Positions

11 currently in the Recruitment Phase

1 scheduled to open in Q3

Turnover Rate 5.69%

OCERS Horizon Staffing Plan

2025

22 Approved Limited-Term Positions resulting in 9 additional Limited-Term headcount

Q4 2025

4 Additional Proposed Limited-Term Positions resulting in 4 additional Limited-Term headcount

2026

4 Additional Proposed Limited-Term Positions resulting in 4 additional Limited-Term headcount

## Limited Term Positions– Summary

Department	Limited Term (LT) Position	Additional Headcount	2025 Budget Impact (fully loaded)	2026 Estimated Annualized Budget Impact (fully loaded)*
Disability	Retirement Program Specialist	1	\$26,698	\$106,793
Member Services	Accounting Technician	2	\$49,364	\$197,458
Member Services	Retirement Benefits Technician	1	\$21,078	\$84,311
Finance	Accountant Auditor	1	\$0	\$129,411
IT	Business Systems Analyst	1	\$0	\$175,489
IT	Data Analyst	1	\$0	\$196,350
IT	AI Automation Engineer	1	\$0	\$243,927
Current Total		8	\$97,140	\$1,133,739
Previously Approved Total		9	\$637,130	\$1,098,257
Grand Total		17	\$734,270	\$2,231,996

\*Figures based on 2025 rates

No 2025 budget amendment needed, will be absorbed within current budget



## Recommendation

Approve and recommend to the Board of Retirement the following 8 Limited Term position requests for the Disability, Member Services, Finance and Information Technology Departments in preparation for the PAS Implementation:

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 these staffing changes is **\$1,133,739**. The estimated budget impact for 2025 due to Q4 hiring for several positions is **\$97,140, however**, we anticipate the estimated cost for the additional positions in 2025 can be absorbed within the existing budget.



Questions?



## Memorandum

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**DATE:** June 25, 2025

**TO:** Members of the Personnel Committee

**FROM:** Cynthia Hockless, Director of Human Resources, Sarah Abrahamson, HR Analyst, and John T. Nguyen, HR Staff Specialist

**SUBJECT:** AGENCY TALENT NEEDS REVIEW PROCESS

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### Background/Discussion

The Agency Talent Needs Review, introduced by CEO Steve Delaney, serves as a strategic checkpoint for departments with newly vacated positions. Its goal is to assess whether a role should be filled as-is, restructured, or eliminated, ensuring alignment with the agency's evolving priorities and exploring opportunities for increased efficiency through technology or automation.

We saw the need to automate this process to ensure that each vacancy was reviewed critically for operational necessity, strategic alignment, and modernization opportunities before refilling.

Initially, hiring managers were required to meet with all Senior Executives to justify the need for a position. While this thorough process ensured accountability, it created scheduling challenges and delayed decision-making.

To streamline the process, the format was changed to an email-based review. Hiring managers submitted written justifications, and Senior Executives responded with a simple "Yes" or "No." Although this expedited approvals, it consistently introduced difficulties in tracking and archiving responses.

The Agency Talent Needs Review process has been updated to improve efficiency using DocuSign. This new approach replaces previous models, streamlines approvals, and supports data-driven staffing decisions that reflect the agency's evolving priorities.

The HR Recruiting team will give a high-level preview of the newly approved process at the June 25 Personnel Committee meeting.

### Attachment

1. Agency Talent Needs Review Presentation

### Submitted by:



**CH - Approved**

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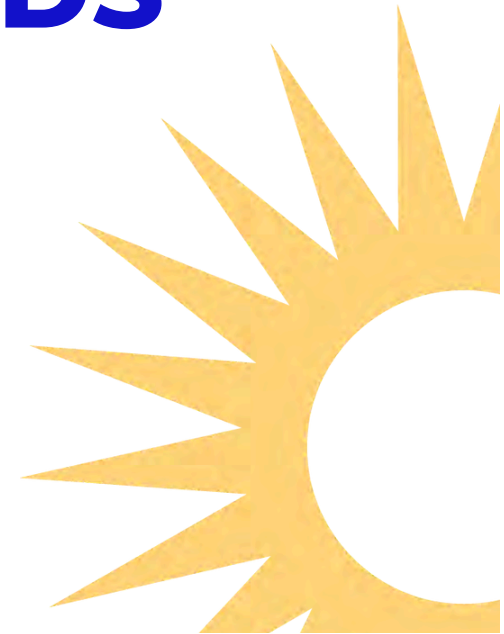
Cynthia Hockless  
Director of Human Resources



# **STREAMLINING THE AGENCY TALENT NEEDS REVIEW PROCESS**

Sarah Abrahamson, HR Analyst

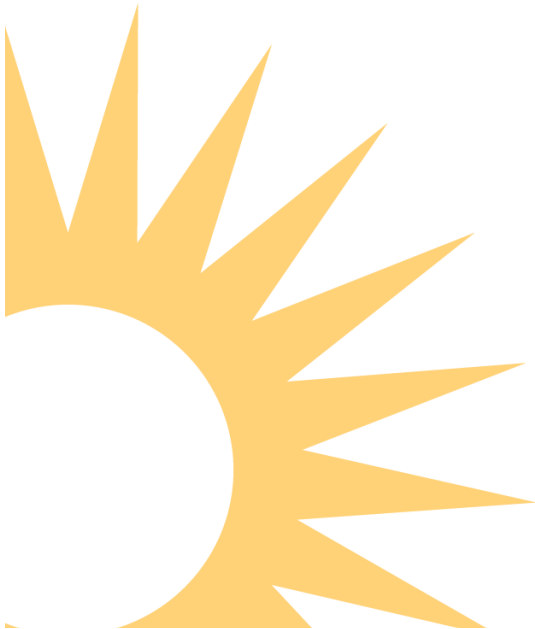
John T. Nguyen, HR Staff Specialist



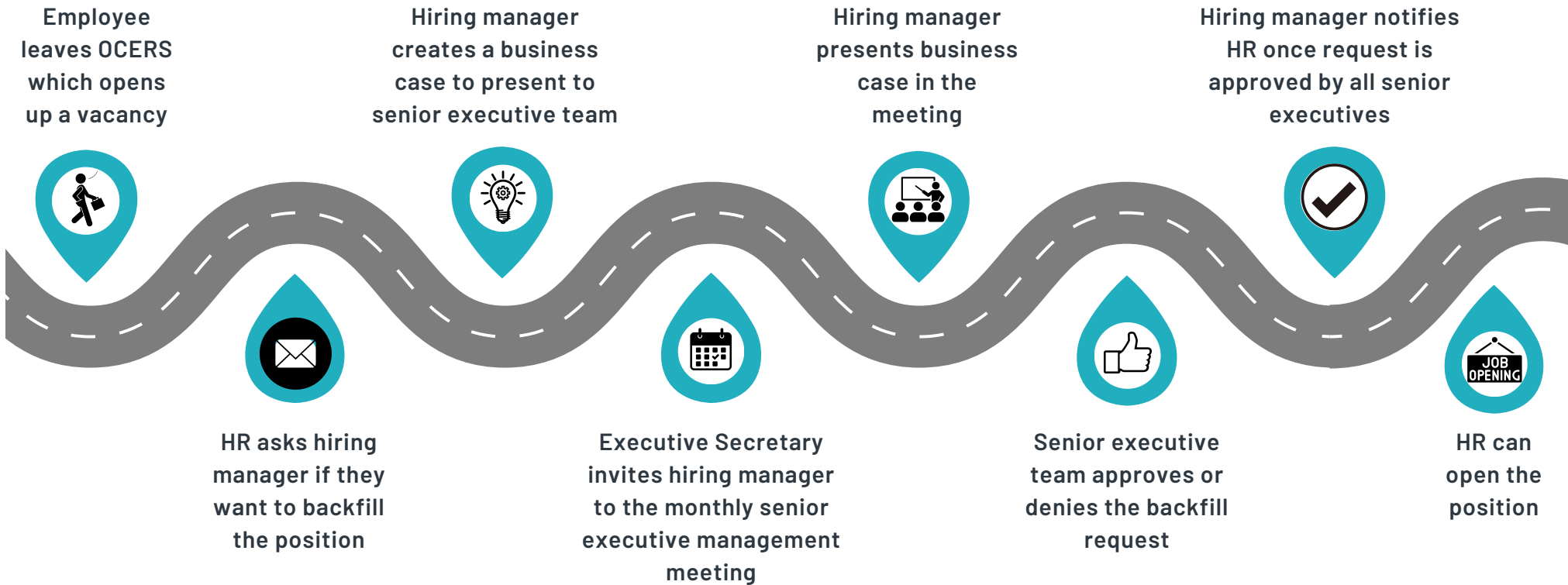


# WHAT IS THE AGENCY TALENT NEEDS REVIEW PROCESS?

The **approval process** required  
before **backfilling a position**  
after someone leaves OCERS



# OLD AGENCY TALENT NEEDS REVIEW PROCESS





# CHALLENGES WITH THE OLD PROCESS



**Slow Backfill  
Approval  
Process**

**Urgent Backfill  
Needs  
Disrupted the  
Process**

**Rethinking  
Senior  
Executive  
Involvement**

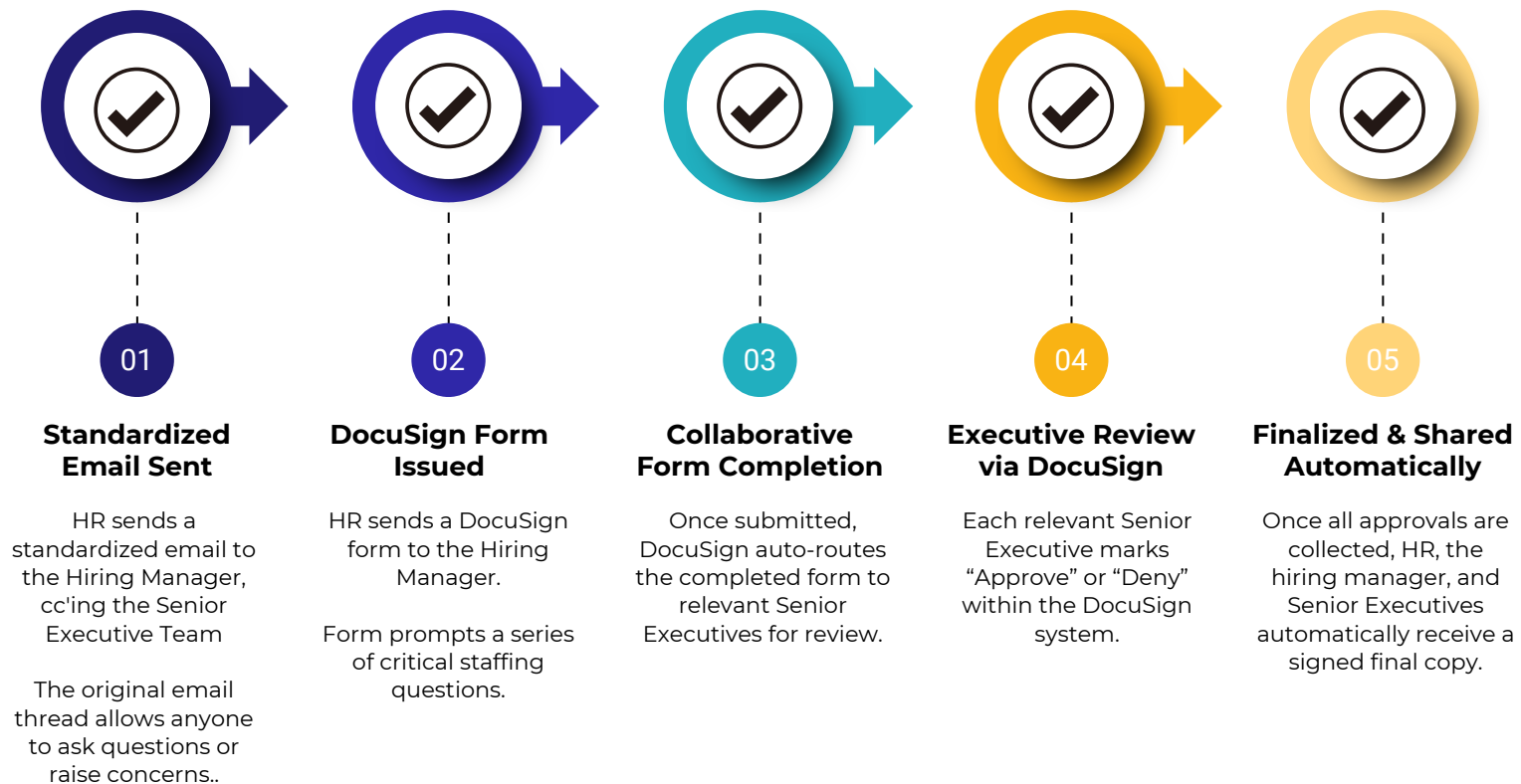
## From Idea to Implementation – Spark Quest Success



- Noticed inefficiencies in the staffing review process.
- Inspired by Lean Six Sigma and Vision 2030 (automation focus), I submitted the idea through Spark Quest, OCERS' staff innovation platform.
- With support from the Spark Quest Committee, the idea was tested, refined, and is now officially adopted.

## NEW STREAMLINED

# AGENCY TALENT NEEDS REVIEW PROCESS



## Email Example

Hello Team,

You are receiving this email because a current or upcoming OCERS county employee vacancy has been identified in your department. To ensure we are aligned on staffing needs, a **DocuSign envelope** titled *Agency Talent Needs Review Form* will be sent to you shortly.

**Summary of Position** (County Position Title): Description

**Department Submitter:**

Please complete the form in full detail to help the Senior Executive Team understand the request. Once submitted, it will automatically route to the appropriate approvers.

**Senior Executive Team:**

After the form is submitted, you will receive it via DocuSign for review and approval. If you support the request, please check the "Approve" box and sign the form.

**Lastly, Senior Executives — if you have any questions about the request submitted by the Department Submitter, please reply directly to this email thread so the submitter can provide clarification.**

Thank you,

# Form Example

## Agency Talent Needs Review

Submitter Name:

Submitter Position Title:

- The [  ] position is currently or will soon be vacant. Does your department believe this position needs to be filled? (If yes, complete questions 2 and 3)  
  
☐ Yes ☐ No
- If you selected 'Yes,' please provide a detailed explanation of why this position is necessary, confirm that there are no readily available system integrations or technology solutions that could replace or supplement its responsibilities, and explain why the key tasks and duties cannot be effectively reallocated to other team members.

**Chief Executive Officer Approval:** ☒ Yes ☐ No  
 Chief Executive Officer Signature:  Date:

**Assistant CEO, External Operations Approval:** ☒ Yes ☐ No  
 Assistant CEO, External Operations Signature:  Date:

**Assistant CEO, Internal Operations Approval:** ☒ Yes ☐ No  
 Assistant CEO, Internal Operations Signature:  Date:

**General Counsel Approval:** ☒ Yes ☐ No  
 General Counsel Signature:  Date:

**Chief Investment Officer Approval:** ☒ Yes ☐ No  
 Chief Investment Officer Signature:  Date:

**Chief Technology Officer Approval:** ☒ Yes ☐ No  
 Chief Technology Officer Signature:  Date:


# **BENEFITS OF THE NEW PROCESS**



**Fast  
Backfill  
Approval  
Process**



**Standardized  
Process**



**Checking  
Approval  
Status**



**Senior  
Executive  
Time  
Saved**



## Memorandum

**DATE:** June 25, 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 May 27, 2025, OCERS hosted the Quarterly All Employer Meeting with representatives from the Orange County Fire Authority (OCFA), Orange County Transportation Authority (OCTA), the County of Orange, Orange County Superior Court, and other participating employers. At the meeting, OCERS presented an updated draft of the *Employer Handbook*, intended to support the broader Data Policy.

The meeting also covered enhancements to payroll transmittals, including updates to data fields that will enable automation of benefit calculations in the upcoming Pension Administration System (PAS) and possible enhancements for automated calculations in the interim. These improvements are aimed at reducing manual processing and supporting 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 support implementation, OCERS will continue one-on-one meetings with Employers in July, beginning with Orange County Superior Court. Conducted by the Employer Payroll team and Member & Employer Relations Section staff, these meetings will assess readiness, offer tailored guidance, and secure the necessary payroll data—an effort launched in 2024 that remains essential to the success of the new PAS.

### Submitted by:



**MA - Approved**

Mark Adviento  
Director of Member and Employer Relations Section  
Member Services



**DK - Approved**

David Kim  
Assistant CEO, External Operations