

CHIEF RETIREMENT COUNSEL

Sonoma County Employees' Retirement Association





THE COUNTY

Located less than an hour's drive north of San Francisco, Sonoma County combines, in one location, the beautiful Pacific Coastline, award winning wineries, majestic redwoods, historic towns, fine dining, and a wide variety of entertainment and cultural activities.

Sonoma County is the largest county in the North Bay and is home to over 500,000 residents. Santa Rosa, with a population of over 171,000, is the County seat and center of government, commerce, and medical facilities. It offers a lively downtown with intriguing shops and restaurants as well as a full range of urban amenities. Santa Rosa and the County's seven other incorporated cities each maintain a small town feel, despite ongoing growth. Excellent health care services are available at several acute care hospitals, a trauma center, and a wide variety of specialty medical facilities. Fine educational institutions, including Santa Rosa Junior College and Sonoma State University, and local schools that rank considerably higher on the Academic Performance Index than the state as a whole, further contribute to Sonoma County's exceptional quality of life.

The County of Sonoma is governed by the Sonoma County Board of Supervisors and is comprised of 26 departments/agencies that provide a full range of services to the community through its 4,000+ employees. Sonoma County government has a history of providing excellent and responsive public service while operating under sound fiscal principles. This is achieved in a climate of respect and collaboration.

SONOMA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

The Sonoma County Employees' Retirement Association (SCERA) is a public employee retirement system that was established by the County of Sonoma on January 1, 1946. SCERA is administered by the Board of Retirement to provide retirement, disability, death, and survivor benefits for the County and other participating agency employees under the California State Government Code, Section 31450 et. seq. (County Employees Retirement Law of 1937) and the California Public Employees' Pension Reform Act of 2013.

SCERA serves over 9,000 active, deferred, and retired general and safety members, with a fund balance of over \$2.3 Billion. SCERA maintains a collaborative partnership with key external professional consultants in the areas of investments, actuarial and legal services. SCERA is legally and fiscally independent of the County, however it utilizes County resources for staffing and human resources management expertise, technology infrastructure, certain areas of legal counsel, and other support. These partners are important team members in meeting SCERA's business plans.

For more information about SCERA, please visit www.scretire.org.

THE POSITION

The Chief Retirement Counsel serves as general counsel for the SCERA Board of Retirement and staff. The position will be responsible for the proper administration, management, and functionality of SCERA's legal activities and operations. Administrative direction is received from the Retirement Administrator, and the Counsel may represent and act on behalf of the Retirement Administrator as directed.

The Counsel serves as a member of SCERA's executive management team, responsible for conferring with and providing advice and assistance to the Retirement Administrator

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and SCERA staff on legal issues and operational considerations, including feasibility and risk analysis. The position's legal advice will focus on issues related to SCERA's fiduciary responsibilities and resolving sensitive and complex legal matters. The Counsel also assesses and, when appropriate, recommends retaining the services of outside legal expertise to advance or protect SCERA's interests, and oversees the selection and work of outside counsel.

The Chief Retirement Counsel is directly employed by and serves at the will of the SCERA Board of Retirement. As such, the incumbent is neither considered an employee of the County of Sonoma nor subject to the County's Civil Service Rules. Employment terms and benefits are subject to SCERA Retirement Board employment contract.

THE IDEAL CANDIDATE

The ideal candidate will possess substantive knowledge and experience specific to the operation of a public retirement system, including advising a multi-member governing body, and the individual will have the ability to establish an effective working relationship with a diverse group of interested parties. Candidates with this knowledge, experience, ability, and the following proven competencies and characteristics will be considered highly competitive:

- Outstanding oral and written communication skills, including the ability to clearly and concisely communicate legal information in public and other group settings; strong interpersonal skills; and the ability to work collaboratively.
- The ability to provide sound legal counsel in clear and understandable terms on a range of public policy issues, in particular, prior knowledge of and experience with the County Employees Retirement Law of 1937, the Public Employees' Pension Reform Act of 2013, the Brown Act, the Public Records Act, and California conflict of interest laws.
- Strong fiscal/budget management skills.
- Detail orientation with strong problem solving and conflict resolution skills.
- Political sensitivity.
- Flexibility and creativity in providing legal advice and options.
- Proven ability to manage outside legal counsel providing contracted services.
- A strong generalist legal background; well-versed in public law; and with deep experience in complex contract transactional, negotiation, and advisory work in a public agency.
- A record of integrity, diligence, and trustworthiness is essential.

SELECTION PROCESS

- Accepting submissions until SCERA determines that a sufficient number has been received.
- Initial interviews will be conducted with SCERA/County management.
- Finalist interviews will be conducted with the SCERA Board of Retirement.

MINIMUM QUALIFICATIONS

The minimum qualifications for this position are:

- Possession of a Juris Doctor degree or equivalent from an accredited U.S. law school.
- Six years of progressively responsible experience in a comparable legal environment.
- Three years of experience advising a public employee retirement system.
- Current active membership in the State Bar of California.

COMPENSATION

SCERA offers a competitive total compensation package. Salary for the Chief Retirement Counsel, effective July 7, 2015, is \$140,040—\$170,220 annually. Initial salary will depend on experience and qualifications. This position is covered by Social Security, and provides benefits that are coordinated with the County by a Memorandum of Understanding that include:

- Paid Time Off: Competitive vacation accrual and additional management leave annually; 11 holidays per year; generous sick leave accruals, and 100% of accrual balance converted to service credit at retirement.
- Health Plan: Choice of three health plans (A PPO, EPO and two deductible HMO's) with a SCERA contribution toward the premium of approximately \$500 per month.
- Excellent dental, vision, disability, life insurance, professional development, and more.
- Cash allowance (in addition to monthly salary) of approximately \$600 per month.
- IRS 457 Plan: Pre-tax employee contribution up to the IRS annual maximum.
- Retirement: County Employees Retirement Law of 1937. Retirement is fully integrated with Social Security. With the recent pension reform, new employees as defined and eligible will receive a 2.5% at 67 formula, or for those individuals who meet certain criteria, including establishing reciprocity eligibility pursuant to PEPRA, will receive 3% at 60.
- Incentive Retirement Savings Plan: A defined contribution 401(a) plan; a 1% County "foundation" contribution.
- IRS 457 Plan: Pre-tax employee contribution up to the IRS annual maximum, plus a 100% County match of employee contribution toward 457 plan (up to 1% of base salary).
- Retiree Medical: County contribution to a Health Reimbursement Arrangement to help fund post-retirement employee health insurance/benefits.

Important Note: Benefits described herein do not represent a contract and may be changed without notice.

For additional information about SCERA visit www.scretire.org. For additional information about the County visit www.sonomacounty.ca.gov.

HOW TO APPLY

Please apply on-line by **Friday, September 25, 2015** at www.allianceRC.com.

For questions and inquiries, please contact Sherrill Uyeda or Cindy Krebs.

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