

BENEFITS ROUNDTABLE

Friday, September 20, 2019
Hilton Oakland Airport
1 Hegenberger Road, Oakland, CA

PRELIMINARY AGENDA

- 8:30 a.m. Registration & Continental Breakfast**
- 9:00 a.m. Welcome & Introductions**
- 9:30 a.m. Presentation by CalPERS: My|CalPERS System Enhancements for Reciprocal Business Partners**
- 10:00 a.m. Discussion Topic**
Is your system using a universal reciprocity email address to submit requests? Are you accepting responses and signatures via email/electronic? (ACERA)
- 10:20 a.m. Presentation by CalPERS: State Social Security Administrator Program Funding** - <https://www.calpers.ca.gov/docs/circular-letters/2019/200-022-19.pdf>
- 10:45 Break**
- 11:00 a.m. Discussion Topics**
- Retirement Allowance Option Allowance Elections: What do your agreements look like? Are final calculations included or just an estimate provided at the time of selection? Are the numbers separate from the election form? (ACERA)
 - Unpaid Leave: What does your system consider a return to work for the purposes of final compensation? Do you count paid time such as vacation, personal leave, or catastrophic leave where the member makes contributions? (MCERA)
 - Minimum Distributions: What happens when the member cannot be found? Is there a minimum amount set for the monthly allowance you will pay and if so, do you provide an alternative (lump sum of present value)? (ACERA)
 - How do you keep up morale during peak seasons? Are you cross-training to address resource issues? How is your team engagement? (ACERA)
 - Working after retirement: How does your system interpret/administer the limited duration language contained in Government Code sections 7522.56(e) and 21224(2)? (CalPERS)
 - Are others experiencing a decrease in disability applications over the past year or two like CalSTRS is experiencing. If so, does anyone have any thoughts as to why? (CalSTRS)
 - We're finding that more and more of our retired Members, or their family/friend caretakers, are running into aging issues, mostly related to



dementia and conditions/illnesses. We're not a social services agency so can't do much to help them but we're also a monthly contact for these people and they turn to us for help. We're considering staffing a unit that could act as an advocate for these people, or, at the very least, refer them to agencies that provide services that can help/support them. We don't know how much other systems are doing for their members, if anything, in this area. (LACERA)

- 12:00 p.m. Lunch Buffet**
Select chair (or co-chairs) for next Roundtable
- 1:00 p.m. Discussion Topics (Continued)**
- 3:30 p.m. Adjourn**

The next Benefits Roundtable will be in 2020. Details will be posted to the CALAPRS website and emailed to you as soon as they are available.