




Strength. Service. Commitment.

June 8, 2017

To: Board of Retirement

From: David B. Wescoe 
Chief Executive Officer

Re: **CHIEF EXECUTIVE OFFICER'S REPORT**

Jim Feeley. June's Board meeting will be Alternate Trustee Jim Feeley's last. Jim has served on the SDCERA Board of Retirement for over 30 years, first as an active employee from 1982 to 1992 and as the alternate retiree member from July 1996 until now. Jim is a shining example of dedication to public service in general and to SDCERA and its Members in particular. We will celebrate Jim's tenure in an appropriate manner at the meeting.

FY 2018 Budget. Greg Bych and the Finance team have done an excellent job preparing and explaining the FY 2018 budget, which the Audit, Finance and Budget Committee unanimously passed at its May 25 meeting. Expense reductions and service improvements both continue.

Retirement Seminars. Feedback from our retirement seminars continues to be very positive: "Thanks for the info! And thanks for yesterday's great presentation. It made what can seem a very scary process less terrifying and intimidating. Thanks again, and you will be hearing from me in the very near future."

Teresa Clanton. Teresa Clanton graduated from IMPACT San Diego on June 2. IMPACT San Diego is a LEAD San Diego program that develops and enhances leadership skills for tomorrow's community leaders. Teresa has excelled in the program, and her participation has already added value to SDCERA's leadership team.

Enrika Zumaya. Mario Correa sent the following feedback about Enrika Zumaya's recent involvement in a disability hearing *de novo*:

I wanted let you to know that Enrika represented SDCERA well today as a witness in the hearing *de novo*. First of all, Enrika took copious notes of her phone conversations with the applicant which preserved the record and allowed her to refresh her recollection on events that took place back in 2011. During her testimony, Enrika provided just the facts. Enrika was credible, and she stood by her testimony when cross-examined. The fact that the applicant thanked Enrika for her testimony says something. Enrika made a difference today in helping preserve the integrity of the disability process. My heartfelt thanks go to Enrika!

Fire Drill. Our office building held a test fire drill on June 1, and staff was well trained on how to respond. According to Millie Busse, SDCERA's Fire Chief, "SDCERA got an excellent review from the property manager and security team. Everyone got out quickly and safely and checked in just like you're supposed to. By the time they got there, SDCERA was all checked in and ready to hand in our attendance sheets. They were very impressed with our group."

Employees of the Month. Diwata Brown and Zach Sickels. A suggestion from Diwata and Zach (or, as I sometimes call them, "Zawata") has improved our efficiency for scanning Member documents into PROMiS. Zawata's ideas for improvement came about because they asked, "Why do we print out documents from PROMiS only to scan them back in after a process is completed?" As a result of Zach and Diwata's critical thinking, the number of pages staff needs to scan into PROMiS has been significantly reduced (by 70,000 unnecessary pages into PROMiS each year so far). This is a great example of asking "why" and, when the answer is unsatisfactory, improving what we do.

Gina Mora. Gina has been with the Active Benefits team for four months. In that short time, she's mastered some of the most complex Member Benefits processes including reciprocity, returning member setups, and DRO splits. She's also added value by writing an in-depth, 21-page process document covering all technical aspects of reciprocity. Gina's can-do attitude and her technical expertise make her a great addition to SDCERA.

Chantal Bsaibes. Chantal's role of calculating and monitoring the excess benefits for the 415 Plan Members in the Retired Benefits Unit is critical to our Monthly Payroll process. Chantal monitors the plan and notifies Accounting of changes every month. With the change in annual plan limits, she re-calculated and prepared customized letters for each 415 Plan Member, informing them of their plan limit for this year. Additionally, Chantal calculated 136 benefit calculations as a result of the increase in March retirements (an average month's would be 40!), successfully managing her workload and meeting the two-week deadline independently and accurately. Chantal's ability to learn quickly enabled her to make an immediate impact to SDCERA and our Members.

Phylicia Cicalo-Aiken. Phylcia has single-handedly managed all Human Resources activities and processes since Teresa Wiatrowski's retirement in March. From running payroll and handling several simultaneous recruitments, her dedication and quality work has been on full display. It's just the most recent example of how Phylcia consistently goes "above and beyond."

Anniversaries. I was remiss in not mentioning in my last Board Report that Stephanie Massy celebrated her 3-year SDCERA anniversary in May. June anniversaries include Marilou Balagtas (22 years), Karen Johansen (11 years), Diwata Brown (4 years) and Greg Bych (2 years).

Conclusion. I have joined another Book Club.

THE NEW YORKER

SUMMER READING GROUP

