SACRS FALL CONFERENCE 2026

P M G

The Center of Collaboration at LACERA

Process Management Group



PRESENTED BY

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Retirement Benefits Specialist III

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Section Head

Mission Statement

To be the driving force behind operational excellence at LACERA, serving as the center of collaboration across divisions to drive innovation, strategic alignment, and continuous improvement.

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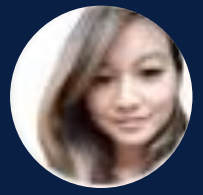
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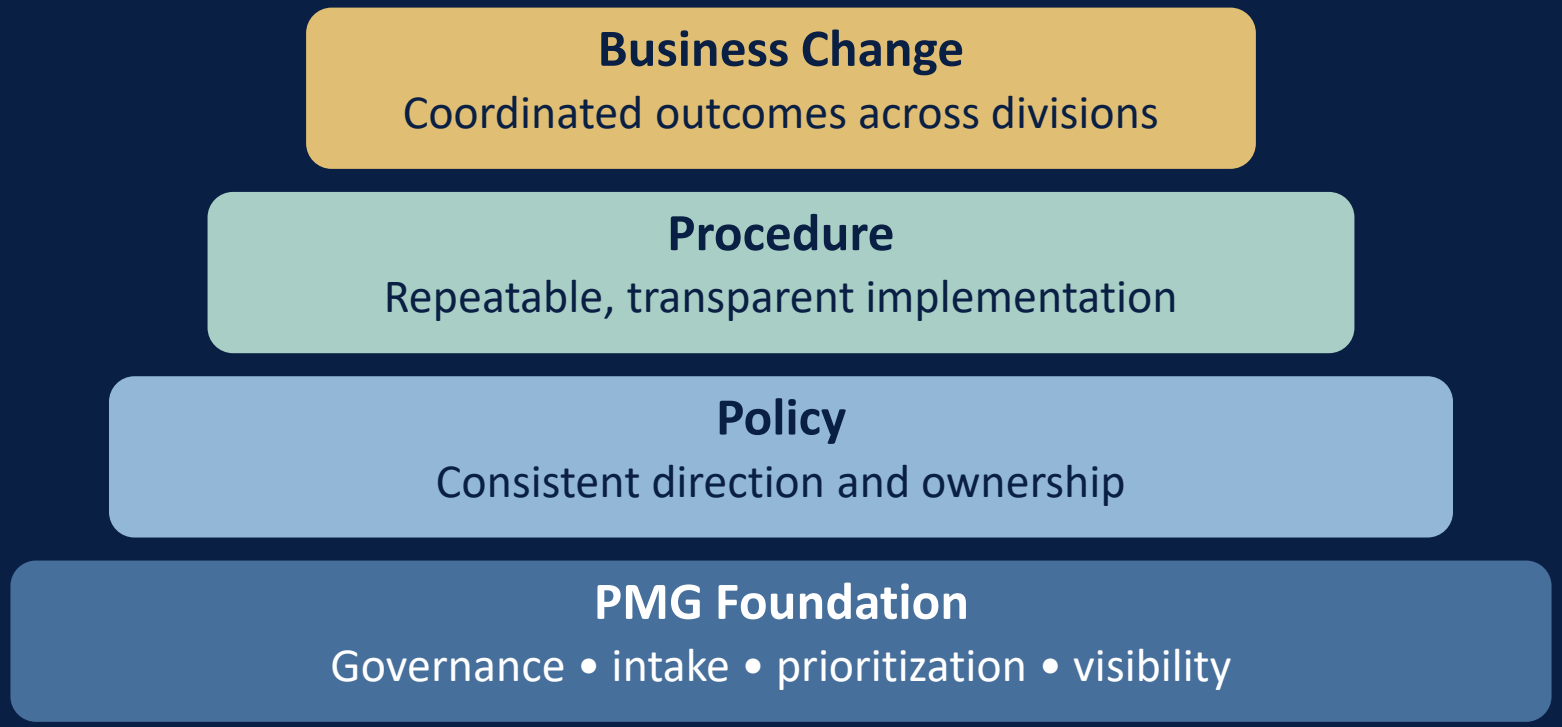
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The role of PMG

1. Provide a single point of coordination
2. Make decisions and tradeoffs visible
3. Connect divisions before changes move forward

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PMG at the Base of Organizational Change



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DRIVE

A consistent, transparent pathway for turning ideas into coordinated action.

D	R	I	V	E
Define	**Route**	**Implement**	**Verify**	**Execute**

A structured framework for managing requests and organizational changes from initial definition through implementation and execution.

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A coordinated path for change

1. **Identify the need**
   A question, finding or change prompts review.
2. **Bring partners together**
   PMG clarifies the issue with affected divisions.
3. **Develop the response**
   Based on feedback from partners, PMG shapes rules, procedures or materials.
4. **Coordinate review and rollout**
   PMG helps align legal and system dependencies.
5. **Gather feedback**
   Divisions surface gaps for the next improvement.

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The intermediary with Systems, Legal and Executive

Systems

Business need into system requirements

Legal

Operational questions into legal guidance

Executive

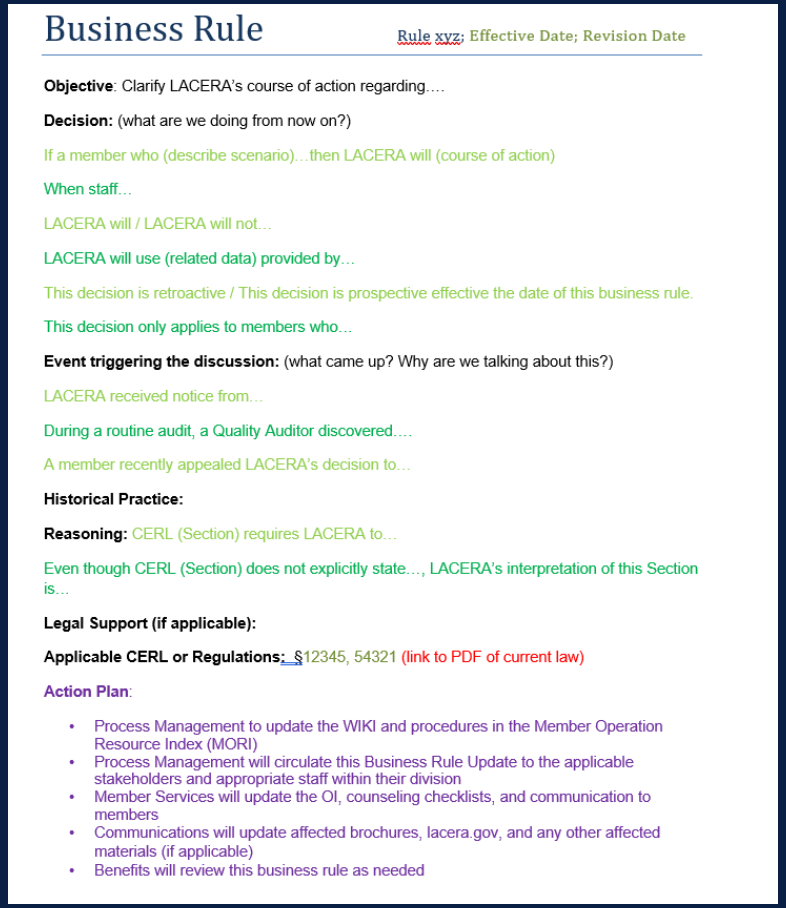
Tactical intelligence into informed decisions

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Business Rule Updates and Procedures

The What, Why and How at LACERA

- **Business Rule Update:** a record of an executive decision or proposed practice change, with its rationale
- **Procedure:** a documented set of step-by-step instructions that explains how to consistently perform a specific task or process.



Business Rule

Rule xyz; Effective Date; Revision Date

Objective: Clarify LACERA's course of action regarding….

Decision: (what are we doing from now on?)

If a member who (describe scenario)…then LACERA will (course of action)

When staff…

LACERA will / LACERA will not…

LACERA will use (related data) provided by…

This decision is retroactive / This decision is prospective effective the date of this business rule.

This decision only applies to members who…

Event triggering the discussion: (what came up? Why are we talking about this?)

LACERA received notice from…

During a routine audit, a Quality Auditor discovered….

A member recently appealed LACERA's decision to…

Historical Practice:

Reasoning: CERL (Section) requires LACERA to…

Even though CERL (Section) does not explicitly state…, LACERA's interpretation of this Section is…

Legal Support (if applicable):

Applicable CERL or Regulations: §12345, 54321 (link to PDF of current law)

Action Plan:

- Process Management to update the WIKI and procedures in the Member Operation Resource Index (MORI)
- Process Management will circulate this Business Rule Update to the applicable stakeholders and appropriate staff within their division
- Member Services will update the OI, counseling checklists, and communication to members
- Communications will update affected brochures, lacera.gov, and any other affected materials (if applicable)
- Benefits will review this business rule as needed

Example

Business Rule

Special Death Benefit: Transition from Minor to Adult

When a child turns 18, the surviving spouse no longer receives the child's continuance benefit.

Procedure

Death and Survivorship

Death and continuing benefits for eligible survivors and beneficiaries of active, deferred, and retired LACERA members

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Division Partnerships

Benefits

- Write internal business rules and procedures for existing and new processes
- Train staff on how to do the work for a new process or change in a process or an ad hoc project
- Maintain the Benefits division’s knowledge asset repository
- Maintain and enhance existing supplementary tools that staff use for various processes

Division Partnerships

Quality Assurance

- Review and update new hire training procedures based on changes in business practices
- Address issues which arise during training
- Update audit criteria
- Manage responses to audit findings

Communications

- Write the language and create the document design for various member (public) facing letters involving Benefits processes
- Check the accuracy of information published online and in print.

Division Partnerships

Member Services

- Monitor relevant operational updates and disseminate information to Member Services so staff guidance can remain current.
- Resolve questions about operations and escalated issues that Member Services staff raise
- Support system and workflow improvements

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Project Example

960-hour Rehired Retiree Audit Process

REQUESTED BY

Executive office

REQUEST

Automate the monitoring and notification of rehired retirees.

960

HOUR LIMIT

Monitor rehired retirees to ensure that these members do not exceed the 960-hour limit to remain compliant with IRS regulations .

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Rehired retiree project:

1 **Plan system programming**

Meet with Systems to plan automated monitoring and member notifications in Workspace.

2 **Arrange monthly report data**

Partner with the Auditor Controller to receive the monthly 120-day report.

3 **Create member letter templates**

Prepare notices for new program entrants and members approaching the hour limit (Communications).

Rehired retiree project: cont.

4 **Establish training materials**

Create operating instructions for Member Services to use with members who receive notices.

5 **Train staff and provide resources**

Train staff and create reference resources to support the rehired retiree process.

6 **Define the mailing workflow**

Develop a workflow to ensure automated notification letters reach members on time (Document Processing Center).

Rehired retiree project: cont.

System rollout and data validation

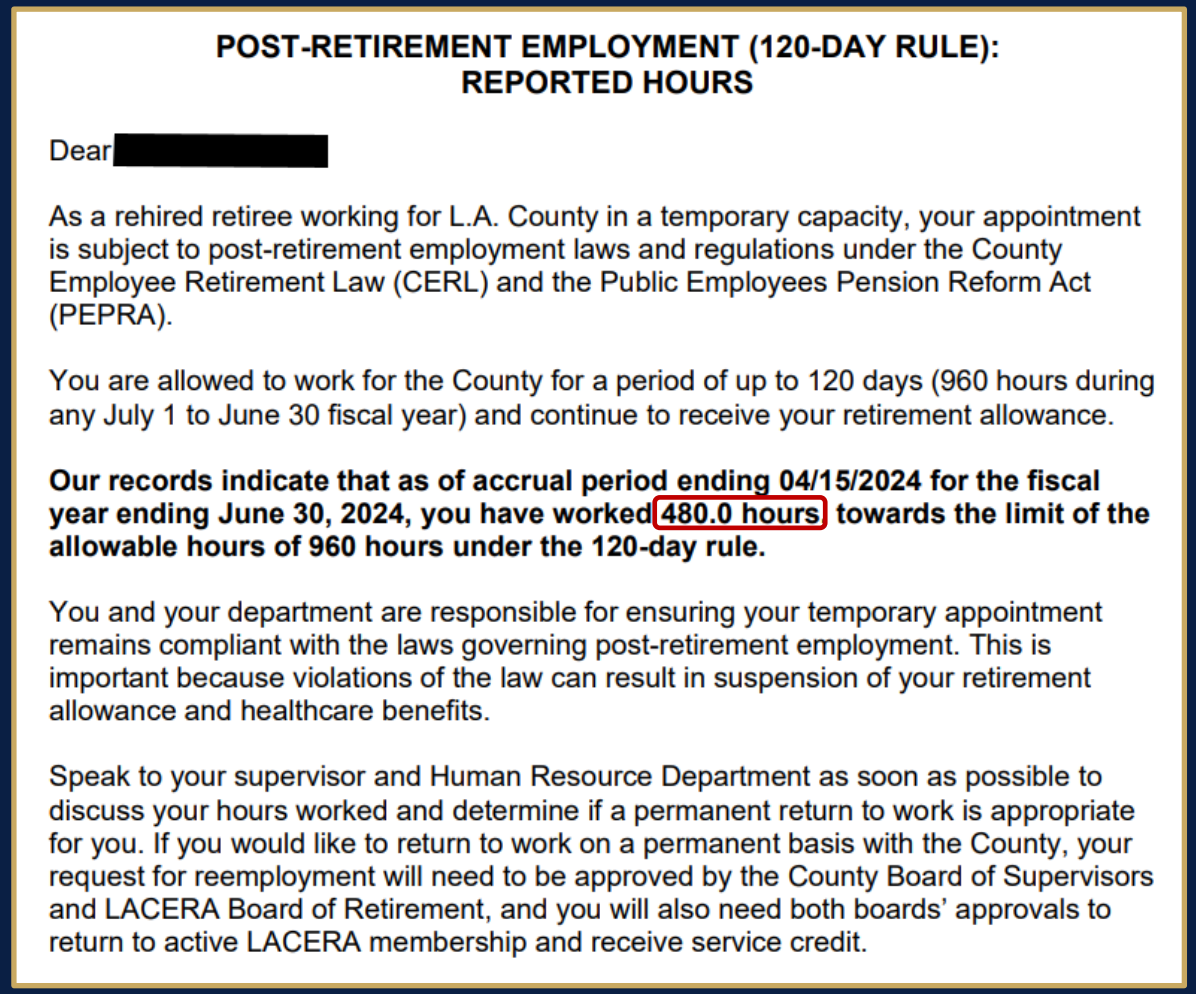
7 **Implement system programming**

Put the planned monitoring and notification automation into operation.

8 **Validate report data in Workspace**

Check imported report data to support monitoring against the 960-hour limit in the charter.

End Result



POST-RETIREMENT EMPLOYMENT (120-DAY RULE):
REPORTED HOURS

Dear [redacted]

As a rehired retiree working for L.A. County in a temporary capacity, your appointment is subject to post-retirement employment laws and regulations under the County Employee Retirement Law (CERL) and the Public Employees Pension Reform Act (PEPRA).

You are allowed to work for the County for a period of up to 120 days (960 hours during any July 1 to June 30 fiscal year) and continue to receive your retirement allowance.

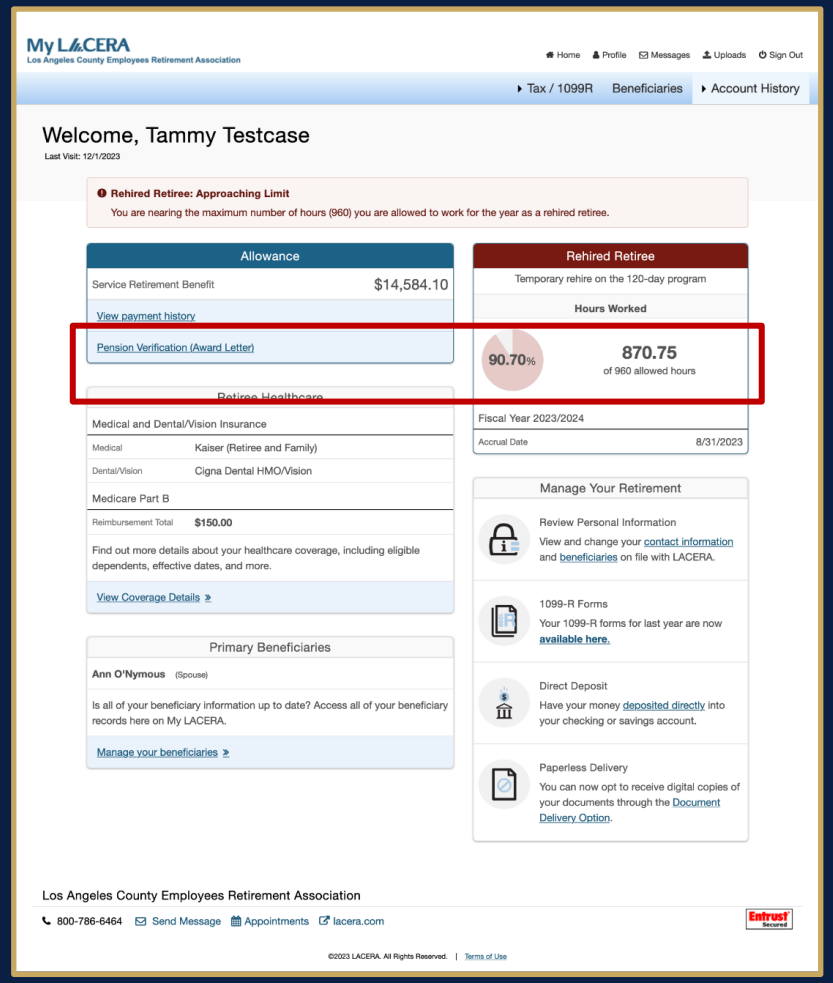
Our records indicate that as of accrual period ending 04/15/2024 for the fiscal year ending June 30, 2024, you have worked 480.0 hours towards the limit of the allowable hours of 960 hours under the 120-day rule.

You and your department are responsible for ensuring your temporary appointment remains compliant with the laws governing post-retirement employment. This is important because violations of the law can result in suspension of your retirement allowance and healthcare benefits.

Speak to your supervisor and Human Resource Department as soon as possible to discuss your hours worked and determine if a permanent return to work is appropriate for you. If you would like to return to work on a permanent basis with the County, your request for reemployment will need to be approved by the County Board of Supervisors and LACERA Board of Retirement, and you will also need both boards' approvals to return to active LACERA membership and receive service credit.

- Once 50%, 75%, or 90% of the allotted hours are used, both the member and their department are sent a letter.
- An email lets the member know a letter is waiting for review in their portal.
- Staff see an alert on the member's Workspace account noting the hours milestone, which also serves as a reminder of the 960-hour limit.

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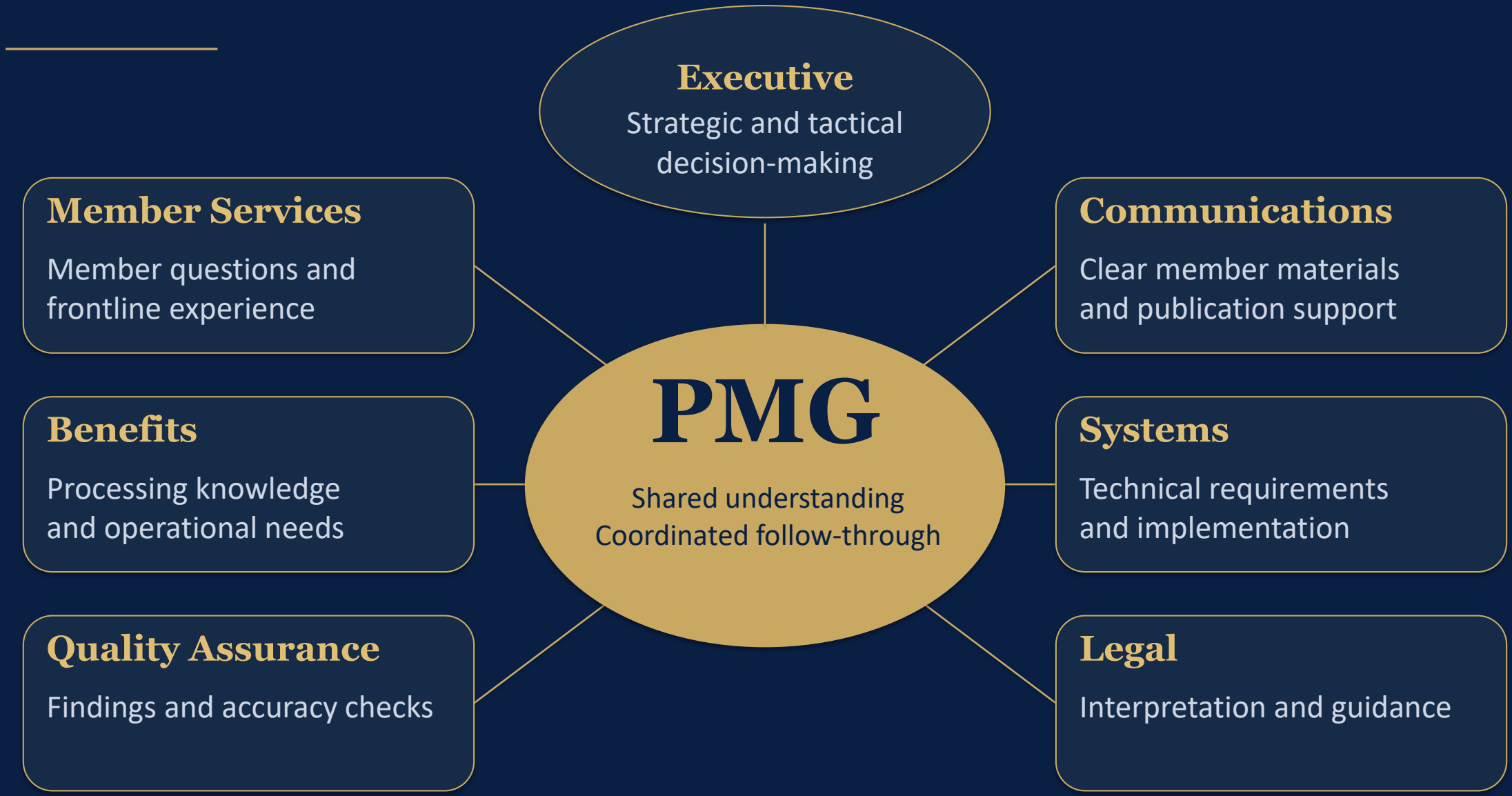


- Once hours are reported, the retiree's portal account displays a new information card
- As the member gets closer to the 960-hour limit the card turns to **Red**
- A warning is also placed at the top of the page to remind members that they are reaching the limit
- Notification letters are also sent to the retirees and their department as retirees reach the hour milestones
- If member reaches or exceeds the 960-hour limit a work object is placed to review the account and if necessary suspend retirement benefits

Additional project examples

1. SOL Case Management System
2. MFA for portal access
3. Service Retirement online application
4. Pre-paid debit card
5. Claim form automation
6. And many more…

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Thank you

Questions and discussion

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