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Status **Pending** PolicyStat ID **17770327**



San Bernardino County Employees'  
Retirement Association

Origination	10/1/2015
Last Approved	N/A
Effective	4/3/2025
Last Revised	4/7/2022
Next Review	4/3/2028

Area	Administration
Applicability	SBCERA systemwide

## SBCERA Position Dual-Fill

### POLICY NO. 016

## I. PURPOSE

The purpose of this policy is to establish general guidelines to be used to ensure appropriate staffing levels and adequate transitional training for permanent positions that will be vacated at the San Bernardino County Employees' Retirement Association (SBCERA). SBCERA uses a process called dual-filling when more than one employee is assigned to a single position on a temporary basis. Dual-filling results in a temporary net increase in total employees, but is not used to permanently increase SBCERA's approved staffing levels.

## II. POLICY

When an SBCERA permanent position will be vacated due to the incumbent's retirement, resignation, or extended leave of absence, the position may be dual-filled on a permanent or provisional basis for up to six (6) months for training or other legitimate business purposes. This advanced appointment requires the approval of the Chief Executive Officer (CEO), but does not require a position allocation change or Board of Retirement approval. Approval may be granted by the CEO only when all the following conditions have been met:

1. There is a critical and legitimate business need to dual-fill the position.
2. The incumbent has submitted a letter of retirement or resignation, or has been granted an approved extended leave of absence.
3. Coverage of the position cannot be accomplished by reallocating job duties to other positions on a temporary basis.

~~Such dual-fill appointment shall be by appropriate means, and in accordance with the Memorandum of Understanding with SEIU Local 721, where applicable.~~

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When possible, dual-fill positions will be funded from each budget's personnel appropriation limits with a level of funding commensurate with the proposed dual-fill position during the normal budget process. For the purposes of this policy, where sufficient funds are not adequate to cover a proposed dual-fill position, the CEO shall have authority to approve transfer of personnel funds between budgets (i.e., Administrative budget to Non-Administrative budget).

The CEO, or his/her designee, will report any transfer of personnel funds for the purpose of dual-filling a position to the Board at the next quarterly budget review report after the approval. If sufficient funds are not available in either budget to cover the cost of dual-filling the position, the CEO may request, and the Board may grant, an appropriation of contingency funds at a regularly scheduled Board meeting, to satisfy the dual-fill.

### Approval Signatures

Step Description	Approver	Date
	Stacey Barnier: Director of Human Resources and Risk Management	Pending

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### Applicability

SBCERA, SBCERA Internal