



# San Bernardino County Employees' Retirement Assoc.

## Staff Report Details (With Text)

**File #:** 19-580.1 **Name:**  
**Type:** Action Item  
**File created:** 10/25/2019 **In control:** BOARD OF RETIREMENT  
**On agenda:** 11/7/2019 **Final action:** 11/7/2019  
**Title:** Approve updates to Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information) including renaming the policy to Requests and Appeals for Pension Benefits.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Exhibit A: Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information), Issue 1.0 - Redline

| Date      | Ver. | Action By           | Action   | Result |
|-----------|------|---------------------|----------|--------|
| 11/7/2019 | 1    | BOARD OF RETIREMENT | Approved | Pass   |

**FROM:** Barbara Hannah, Chief Counsel

**SUBJECT:** Approve updates to Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information) including renaming the policy

### RECOMMENDATION:

Approve updates to Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information) including renaming the policy to Requests and Appeals for Pension Benefits.

### BACKGROUND:

General Policy No. 005 involves periodic review of Board policies and indicates that the Administrative Committee review Administrative and Benefit policies every three years. Accordingly, SBCERA staff has reviewed Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information), and proposes to update the policy.

The proposed updated policy provides transparency of the appeals process, as well as ensures the member or beneficiary will receive due process by providing a right to appeal a decision concerning a benefit, other than a disability retirement benefit since that process is governed by the *Procedures for Disability Retirement Applications and Formal Hearing*. In addition, generally, the Board's decision is final; however, under the updated policy the Board has the discretion to refer an appeal to an Administrative Hearing to be governed by the Rules set forth in the *Procedures for Disability Retirement Applications and Formal Hearing*.

The updated policy is also proposed to be renamed from "Requests for Pension Benefits and the Presentation of Supporting Information" to "Requests and Appeals for Pension Benefits," to more clearly match the substance of the policy.

### BUDGET IMPACT:

None.

**STRATEGIC PLANNING GOAL/OBJECTIVE:**

Operational Excellence & Efficiency

**COMMITTEE REVIEW:**

This item was reviewed by the Administrative Committee at its October 17, 2019 meeting and recommends Board approval, with a 3-0 vote. Trustee Bracco was absent from the meeting.

**STAFF CONTACT:**

Barbara Hannah

**ATTACHMENTS:**

Exhibit A: Benefits Policy No. 025 (Requests for Pension Benefits and the Presentation of Supporting Information) - Redline