



**BOARD OF SUPERVISORS  
AGENDA LETTER**

**Agenda Number:**

**Clerk of the Board of Supervisors**  
105 E. Anapamu Street, Suite 407  
Santa Barbara, CA 93101  
(805) 568-2240

**Submitted on:**  
**(COB Stamp)**

**Department Name:** Human Resources  
**Department No.:** 064  
**Agenda Date:** August 26, 2025  
**Placement:** Administrative Agenda  
**Estimated Time:** N/A  
**Continued Item:** No  
**If Yes, date from:**  
**Vote Required:** Majority

**TO:** Board of Supervisors  
**FROM:** Department Director(s): Kristine Schmidt, Human Resources Director  
Gregory Levin, CPA Chief Executive SBCERS  
Contact: Erin Jeffery, Fiscal & Workforce Planning Division Chief, 805-568-2808  
**SUBJECT:** Establish New Job Classification of SBCERS Disability Retirement Manager

DocuSigned by:  
*Yvonne Torres*  
6C3DCA6C9D81437  
Assistant HR Director

**County Counsel Concurrence**

As to form: Yes

**Auditor-Controller Concurrence**

As to form: Yes

**Recommended Actions:**

That the Board of Supervisors:

- a) Adopt an amendment to the resolution in Attachment A to establish the job classification of SBCERS Disability Retirement Manager (Class #8711, Range #8711, \$60.845-77.652 per hour) and allocate one (1) position; and,
- b) Determine that the above actions are exempt from California Environmental Quality Act (CEQA) review per CEQA Guidelines Section 15378(b)(4) since the recommended actions are government funding mechanisms or other government fiscal activities which do not involve any commitment to any specific project which may result in a potentially significant physical impact on the environment.

**Summary Text:**

Approval of the recommended action would establish the job classification of SBCERS Disability Retirement Manager and allocate one (1) position to the Santa Barbara County Employees' Retirement System (SBCERS).

**Discussion:**

The SBCERS Disability Retirement Manager is a professional management position. Under general direction, the SBCERS Disability Retirement Manager oversees disability retirement including

managing staff, operations, and investigations of disability retirement cases. This role is responsible for ensuring proper administration of cases, conducting complex investigations, developing policies and procedures, directing hearing counsel, and making recommendations to the SBCERS Chief Executive Officer (CEO) on disability-related issues matters.

### **Background:**

This classification is being established to oversee disability retirement benefits for SBCERS. Historically, these responsibilities were managed by an employee in the classification of Enterprise Leader – General, which was a general management classification. After the prior Disability Manager was promoted to Deputy General Counsel in 2022, they retained oversight of the disability unit, eliminating the need for a Disability Manager position. As a result, this position was not included in the County's management classification project, which was implemented in June 2024. However, following the appointment of the Deputy General Counsel to the newly created SBCERS General Counsel position in 2024, it has become evident that best practice necessitates separating disability retirement oversight from general legal counsel duties. Accordingly, the Board of Retirement has approved the creation of the SBCERS Disability Retirement Manager position in the 2025-26 fiscal year budget at its June 25, 2025 meeting.

Over the past 20 years, SBCERS membership has more than doubled and has grown into a financial institution that manages a pension trust valued at over \$4.5 billion with over 12,000 members. Staffing of the Disability Retirement unit has doubled to process increased quantity and complexity of disability retirement applications. Having a dedicated manager will ensure timely and accurate management of sensitive cases, which is essential for delivering high-quality service to members and plan sponsors while safeguarding promised benefits.

The position will report to the SBCERS CEO and will ensure that members receive appropriate benefits, provide leadership to their team of Analysts and Assistants, and help ensure the integrity of the disability retirement process. Examples of the duties performed by the position follow:

1. **Management and Leadership.** Directs the daily operations of the Retirement Disability unit; supervises paraprofessional and professional staff, including hiring, training, assigning tasks, and evaluating performance; supports staff in setting and achieving performance goals and deadlines, ensuring accountability and efficiency; establishes performance measures and ensures compliance with relevant policies and regulations; provides analytical and technical expertise to staff and ensures adherence to federal, state, and local laws, policies, procedures, and fiduciary duties.
2. **Policy Development and Compliance.** Develops, revises, and implements disability retirement administrative, investigative and hearing policies and procedures; identifies opportunities for process improvement and implements innovative solutions to enhance efficiency, accuracy, and service delivery; interprets and explains the County Employees Retirement Law of 1937 (CERL) and retirement standards to stakeholders; advises the CEO on disability retirement policies, reasonable accommodation issues, and legislative changes; and represents SBCERS in statewide retirement associations and committees.
3. **Financial and Statistical Analysis.** Researches, compiles, and analyzes disability retirement data for executive reporting; prepares statistical and narrative reports for the CEO and Board of Retirement; oversees and approves budgetary expenditures, projections, and fiscal planning; develops communications for SBCERS members regarding disability benefits.
4. **Case Oversight and Management.** Reviews staff work on assigned cases and approves investigation strategies; assigns cases to hearing counsel and collaborates on litigation

strategies; monitors hearing counsel performance and evaluates billings requests; conducts legal research, drafts legal documents, and ensures compliance with filing requirements.

5. **Processing of Complex Disability Cases.** Leads the investigation and resolution of highly complex or sensitive disability cases; analyzes intricate medical, legal, and employment factors impacting disability determinations; ensures cases adhere to statutory requirements under the CERL; works with hearing counsel, medical professionals, and agency stakeholders to develop sound and fair case resolutions.

The compensation for this position reflects both the technical legal nature of the position and the requirement for a candidate that can work with numerous legal counsels and the System's governing body.

**Fiscal and Facilities Impacts:**

Budgeted: This position was created by the Board of Retirement as part of its public annual budget process which involves two separate public hearings to discuss the annual budget of the System. The position was costed using the County's budget salary model in effect during 25/26 budget cycle. This will be a permanent regular position and thus result in a permanent recurring cost to the System. This cost will be shared by SBCERS participating employers and is not expected to significantly change the amount charged for the administration of the System through the annual rate setting process. The cost of managing an effective disability retirement program should be evaluated against the cost of a significant program administration failure.

**Staffing Impacts:**

**Position Request Summary**

Legal Position Title	Number of FTE	Estimated Cost
SBCERS Disability Program Manager	1.0	\$223,259
<b>Total</b>	<b>1.0</b>	<b>\$223,259</b>

**Special Instructions:**

Please email one (1) copy of the Minute Order and fully executed amended Salary Resolution to [HRPositionControl@countyofsb.org](mailto:HRPositionControl@countyofsb.org) and [HRBLCoordinator@countyofsb.org](mailto:HRBLCoordinator@countyofsb.org)

**Attachments:**

**Attachment A** – Salary Resolution Amendment SBCERS Disability Retirement Manager

**Attachment B** – Proposed Class Specification for SBCERS Disability Retirement Manager

**Contact Information:**

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