

TO: Marin County Employees' Retirement Association Board and Members

FROM: Certain MCERA Staff

It is with the humblest of hearts that several of us who make up your MCERA Staff, would like to weigh in and be heard with reference to the direction and mission of this organization that we serve. It is this last word, service, that characterizes the fabric of our vision and ultimately will earn the respect and trust of those we partnership.

Many of MCERA staff have been with MCERA less than two years. Novices, you say? Most of the staff are members as well. We have both a shareholder's and a stakeholder's investment in our organization, both financially and emotionally. We must say that we are all very impressed by not only the talents that each new staff member brings on board, but by the genuine heartfelt commitment to make the retirement process seamless and a celebration for our members. Each new employee that Charnel has hired, seems to reflect this spirit of service to others. We want the best for all the right reasons.

Lisa Jackson heads our Accounting Team and has been with MCERA for approximately 8 years. "Looking forward, I believe we have assembled a fantastic team and our goal is to bring the current accounting system in line with our future systems in CPAS." Lisa is clearly excited by the quality of support Charnel has hired. She and Denise Lee are working intensely to manage the many accounts and systems variations between the county and MCERA. Her recent addition of Sarah Clay to her team, brings accounting experience to ease the work load on Lisa and facilitate the gigantic process of reporting.

A little over a year ago, Helen Moody came on board. Seasoned for many years at another Law of '37 County, her training skills have exponentially broadened the staff's understanding, increased our level of competency and engendered a significant confidence level. Helen has been invaluable in the interface of staff and CPAS. A recent CPAS hire, Keith Bowden, has expertly navigated MCERA through the scanning process and has gone beyond duty to set up our post scan file library. Another great hire.

The staff is dedicated to pushing forward with the many changes required to earn the respect and support of our member owners, including Helen's centerpiece, Education. Education includes everyone from members making responsible and informed choices, to staff, to the agency employers and the board. As you know, her classes, entitled "Group Pre-Retirement Counseling", have been filled for weeks in advance. Feedback we get includes gratitude for the class, during this major life change.

To quote a recent MCERA retiree "This business of Retiring is very complicated!" The word "business" lingered on. He was, of course, referring to all the various benefit changes that he must review, understand, and execute, and how they affect the rest of his life and the lives of his loved ones. Medical allocation factors are constantly changing and of course the costs of supporting a medical and dental benefit continue to rise. Our Post Retirement Benefits Team, Cookie Shamrock and Todd Miller, are entrusted with making the bridge between medical and dental benefits seamless and stress free for our entire member population. Cookie manages the timely payroll delivery every month with

