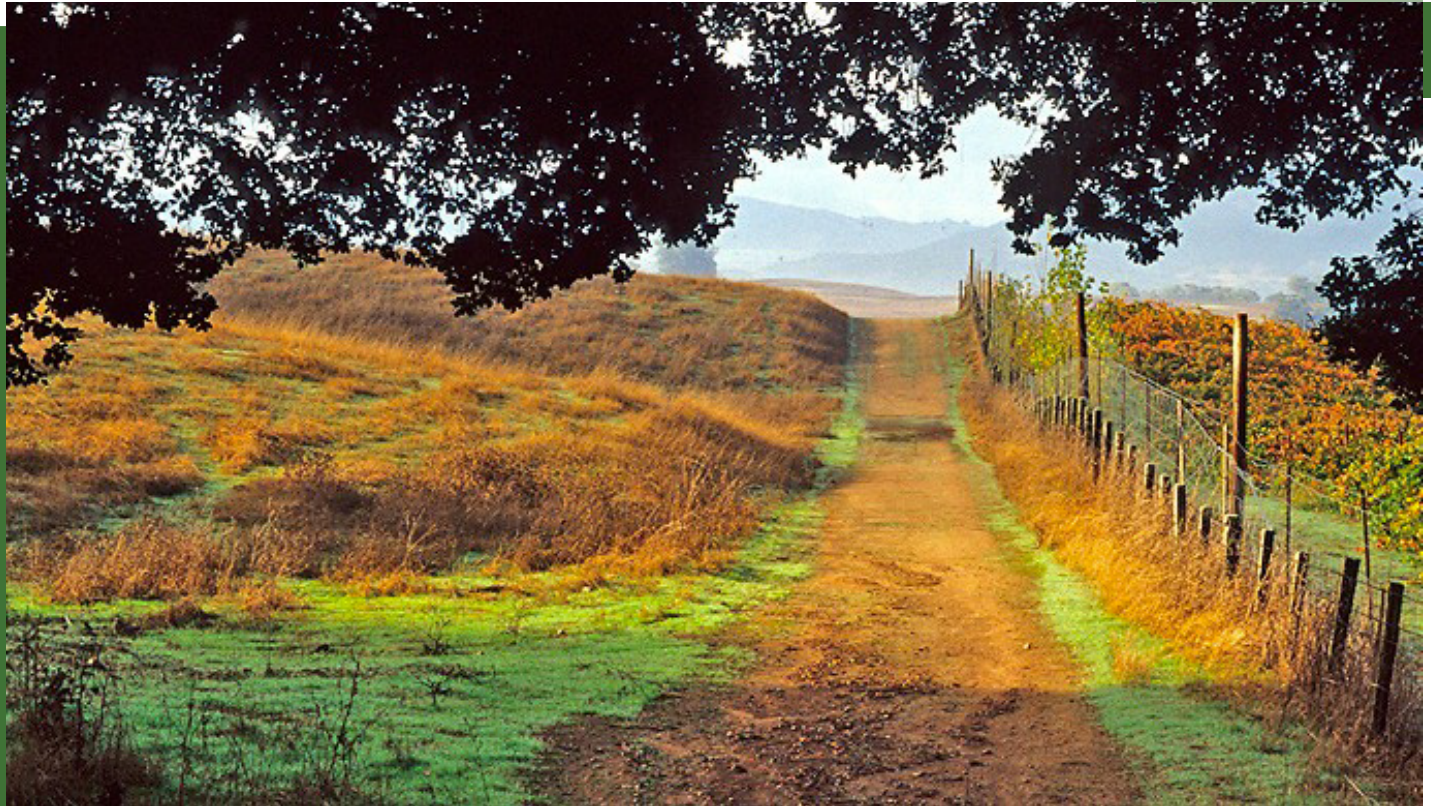


# ASSISTANT CHIEF EXECUTIVE OFFICER/ CHIEF LEGAL COUNSEL

Sonoma County Employees' Retirement Association



## THE COUNTY

Located less than an hour's drive north of San Francisco, Sonoma County combines, in one location, the beautiful Pacific Coastline, award winning wineries, majestic redwoods, historic towns, fine dining, and a wide variety of entertainment and cultural activities.

Sonoma County is the largest county in the North Bay and is home to over 500,000 residents. Santa Rosa, with a population of over 171,000, is the County seat and center of government, commerce, and medical facilities. It offers a lively downtown with intriguing shops and restaurants as well as a full range of urban amenities. Santa Rosa and the County's seven other incorporated cities each maintain a small-town feel, despite ongoing growth. Excellent health care services are available at several acute care hospitals, a trauma center, and a wide variety of specialty medical facilities. Fine educational institutions, including Santa Rosa Junior College and Sonoma State University, and local schools that rank considerably higher on the Academic Performance Index than the state as a whole, further contribute to Sonoma County's exceptional quality of life.

The County of Sonoma is governed by the Sonoma County Board of Supervisors and is comprised of 26 departments/agencies that provide a full range of services to the community through its 4,000+ employees. Sonoma County government has a history of providing excellent and responsive public service while operating under sound fiscal principles. This is achieved in a climate of respect and collaboration.

## SONOMA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

Sonoma County Employees' Retirement Association (SCERA) is a public employee defined benefit retirement system that was established by the County of Sonoma on January 1, 1946, under the authority of the County Employees Retirement Law of 1937. SCERA is administered by the Board of Retirement (Board) to provide retirement, disability, death, and survivor benefits for eligible employees of the County of Sonoma; Sonoma Valley Fire Authority; the Superior Court of California for the County of Sonoma; and other Sonoma County public agencies.

Under the direction of a ten-member Board, of which one is an alternate member, SCERA Staff manages the day-to-day administration of the system. This includes ensuring timely and accurate payment of benefits, oversight of the investment of trust assets, providing information to and counseling members, accounting for contributions and investment income, maintaining prudent regulations, policies and procedures, and ensuring the Board is fulfilling its fiduciary duty to the members and their beneficiaries.

The Board sets the policy direction for the system, provides direct oversight of the Chief Executive Officer, approves the investment program's asset allocation in accordance with the system's defined risk parameters, and carries out its fiduciary duties through regular meetings and oversight of the system's operations. The Staff is managed by the Chief Executive Officer who oversees SCERA's Member Services, Finance and Retiree Services, Legal and Administrative Services divisions and, along with the Chief Investment Officer, Investment division.

As of December 31, 2020, SCERA serves 4,090 active members (General 3,368 and Safety 722), 1,445 deferred/transferred members (General 1,217 and Safety 228) and 5,347 retired members (General 4,339 and Safety 1,008), with a fund balance of \$3 billion. The asset allocation is:

- Equities 61%
- Fixed Income 19%
- Real Assets 20%

SCERA has 12 full time employees presently and this position will make 13.

## THE POSITION

Reporting to the Chief Executive Officer, the Assistant Chief Executive Officer/Chief Legal Counsel provides management oversight for assigned divisions of SCERA, and acts as Chief Legal Counsel to SCERA performing complex, sensitive and varied operational management and professional legal work; advises the Chief Executive Officer and the Board on legal issues arising during public meetings; collaborates with the Chief Executive Officer on the strategic direction of plan operations and governance; performs research, presents legal opinions, training and advice to the Retirement Board, Chief Executive Officer and SCERA staff; and coordinates and oversees the work of outside consultant counsel.



# ASSISTANT CHIEF EXECUTIVE OFFICER/ CHIEF LEGAL COUNSEL

Sonoma County Employees' Retirement Association

In addition to legal counsel responsibilities, the Assistant CEO/Chief Legal Counsel is responsible for the administration, direction, and supervision of operational division managers and functions related to SCERA, in accordance with the policies and regulations established by Federal and State statutes and the Board of Retirement; fosters cooperative working relationships with county departments, intergovernmental and regulatory agencies, and various public and private groups; provides expert professional assistance to the Chief Executive Officer and Retirement Board, and performs other related duties.

This position may represent and act on behalf of the Chief Executive Officer as directed or in the CEO's absence.

The position is open due to the retirement of the incumbent.

## THE IDEAL CANDIDATE

SCERA seeks an experienced public agency lawyer who thrives in a hands on and collaborative environment to be the next Assistant Chief Executive Officer/Chief Legal Counsel. As part of the SCERA executive management team, this person will be responsible for all legal counsel responsibilities as well as managing several internal divisions, participating in organizational strategic planning processes and developing and implementing SCERA Board and management initiatives.

The top areas of focus for the incoming Assistant Chief Executive Officer/Chief Legal Counsel will be:

- Learning SCERA operations and engaging with staff to provide thoughtful, well- reasoned legal opinions that take into account the administrative realities of operating a public sector defined benefit pension plan.
- Assisting the CEO in conducting an organizational review to ensure SCERA continues to operate efficiently in all areas (i.e. member services, financial operations, etc.).
- Examining the procedures that span different divisions to ensure consistency in approach in areas such as trusts, probate and wills.
- Finalizing a Board Resource that provides a comprehensive overview of SCERA for use by trustees.

The ideal candidate will be committed to upholding the fiduciary duty to the members and beneficiaries of SCERA. This person will be able to hit the ground running and quickly gain the confidence and respect of the Board and staff. This person will have experience advising public agencies and understand that legal opinions must be able to be implemented within the administrative realities the agency operates in. Lastly, the selected candidate will be comfortable working in a transparent manner through public meetings and public records requests and embrace opportunities to grow with the SCERA organization in the future.

### **Education, Experience and Certifications**

This position requires any combination of education, training, and experience which would likely provide the required knowledge and abilities. Normally, this would include possession of a Juris Doctor degree or equivalent from an accredited U.S. law school; AND the equivalent of six years of increasingly responsible experience in a comparable legal environment, including at least three years of experience advising a public agency and three years of supervising staff or leading group projects.



# ASSISTANT CHIEF EXECUTIVE OFFICER/ CHIEF LEGAL COUNSEL

Sonoma County Employees' Retirement Association

- Litigation experience and public agency pension or law office program management experience are desirable.
- Current active membership in the State Bar of California is required.

## COMPENSATION

SCERA offers a competitive total compensation package. The salary for the Assistant CEO/Chief Legal Counsel, is \$159,996 to \$193,267 annually. Initial salary will depend on experience and qualifications. This position is covered by Social Security, and provides benefits that are coordinated with the County of Sonoma by a Memorandum of Understanding that include:

- Paid Time Off: Competitive vacation accrual and additional management leave annually; 11 holidays per year; generous sick leave accruals, and generally 100% of accrual balance converted to service credit at retirement.
- Health Plan: Choice of three health plans (A PPO, EPO and two deductible HMO's) with an employer contribution toward the premium.
- Excellent dental, vision, disability, life insurance, professional development, and more.
- Cash allowance (in addition to monthly salary) of approximately \$600 per month.
- Retirement: Participation in the defined benefit pension plan established by County Employees Retirement Law of 1937 is generally mandatory for full time permanent employees. Retirement is fully integrated with Social Security. New employees as defined and eligible under the Public Employees' Pension Reform Act (PEPRA) will receive a 2.5% at 67 formula, or individuals who meet certain criteria, including establishing reciprocity eligibility pursuant to PEPRA, will receive 3% at 60.
- Incentive Retirement Savings Plan: A defined contribution 401(a) plan; a 1% County "foundation" contribution.
- IRS 457 Plan: Pre-tax employee contribution up to the IRS annual maximum, plus a 100% County match of employee contribution toward 457 plan (up to 1% of base salary).
- Retiree Medical: County contribution to a Health Reimbursement Arrangement to help fund post-retirement employee health insurance/benefits.

For additional information about SCERA visit [www.scretire.org](http://www.scretire.org). For additional information about the County, including benefits offered to employees, visit <https://sonomacounty.ca.gov/HR/Benefits/Benefit-Summary/Administrative-Management/>.

## HOW TO APPLY

The filling period for this recruitment is open until filled. Candidates are strongly encouraged to apply by **October 18, 2021**, for first round consideration. Please apply **on-line** at [www.yourpath2sonomacounty.org](http://www.yourpath2sonomacounty.org). For questions, inquiries or candidate recommendations, please contact:

Sherrill Uyeda or Cindy Krebs

### ALLIANCE RESOURCE CONSULTING LLC

Telephone: (562) 901-0769

Email: [suyeda@alliancerc.com](mailto:suyeda@alliancerc.com) or  
[ckrebs@alliancerc.com](mailto:ckrebs@alliancerc.com)



<https://www.linkedin.com/company/alliance-resource-consulting>

*An Equal Opportunity/ADA Employer*