

Benefits Administration Committee Agenda

REGULAR MEETING

TUESDAY, FEBRUARY 28, 2023

TIME: 9:00 A.M.

MEETING LOCATION:

In accordance with Government Code Section 54953, subsections (e)(1) and (e)(3), and in light of the State of Emergency proclaimed by the Governor on March 4, 2020 relating to COVID-19 and ongoing concerns that meeting in person would present imminent risks to the health or safety of attendees and/or that the State of Emergency continues to directly impact the ability of members to meet safely in person, the LACERS Benefits Administration February 28, 2023 meeting will be conducted via telephone and/or videoconferencing.

Important Message to the Public

Information to call-in to listen and/or participate:

Dial: (669) 254-5252 or (415) 449-4000

Meeting ID# 160 660 8850

Instructions for call-in participants:

- 1- Dial in and enter Meeting ID
- 2- Automatically enter virtual "Waiting Room"
- 3- Automatically enter Meeting
- 4- During Public Comment, **press *9** to raise hand
- 5- Staff will call out the last 3-digits of your phone number to make your comment

Information to listen only: Live Committee Meetings can be heard at: (213) 621-CITY (Metro), (818) 904-9450 (Valley), (310) 471-CITY (Westside), and (310) 547-CITY (San Pedro Area).

Chair: Michael R. Wilkinson

Committee Members: Annie Chao
Thuy Huynh

Manager-Secretary: Neil M. Guglielmo

Executive Assistant: Ani Ghoukassian

Legal Counselor: City Attorney's Office
Public Pensions General
Counsel Division

Notice to Paid Representatives

If you are compensated to monitor, attend, or speak at this meeting, City law may require you to register as a lobbyist and report your activity. See Los Angeles Municipal Code §§ 48.01 *et seq.* More information is available at ethics.lacity.org/lobbying. For assistance, please contact the Ethics Commission at (213) 978-1960 or ethics.commission@lacity.org.

Request for services

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Sign Language Interpreters, Communication Access Real-Time Transcription, Assistive Listening Devices, Telecommunication Relay Services (TRS), or other auxiliary aids and/or services may be provided upon request. To ensure availability, you are advised to make your request at least 72 hours prior to the meeting you wish to attend. Due to difficulties in securing Sign Language Interpreters, five or more business days' notice is strongly recommended. For additional information, please contact: Board of Administration Office at **(213) 855-9348** and/or email at ani.ghoukassian@lacers.org.

Disclaimer to participants

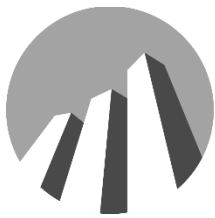
Please be advised that all LACERS Board and Committee Meeting proceedings are audio recorded.

LACERS Website Address/link:

www.LACERS.org

[CLICK HERE TO ACCESS BOARD REPORTS](#)

- I. PUBLIC COMMENTS AND GENERAL PUBLIC COMMENTS ON MATTERS WITHIN THE COMMITTEE'S JURISDICTION AND COMMENTS ON ANY SPECIFIC MATTERS ON THE AGENDA – *THIS WILL BE THE ONLY OPPORTUNITY FOR PUBLIC COMMENT - PRESS *9 TO RAISE HAND DURING PUBLIC COMMENT PERIOD*
- II. [APPROVAL OF MINUTES FOR THE MEETING OF JANUARY 24, 2023 AND POSSIBLE COMMITTEE ACTION](#)
- III. [BENEFITS ADMINISTRATION RESOURCE NEEDS FOR FISCAL YEAR 2023-24](#)
- IV. OTHER BUSINESS
- V. NEXT MEETING: The next Benefits Administration Committee meeting is not scheduled at this time and will be announced upon scheduling. Please continue to view the LACERS website for updated information on public access to Board/Committee meetings.
- VI. ADJOURNMENT



LACERS

LA CITY EMPLOYEES' RETIREMENT SYSTEM



Board of Administration Agenda

SPECIAL MEETING

TUESDAY, FEBRUARY 28, 2023

TIME: 9:00 A.M.

MEETING LOCATION:

In accordance with Government Code Section 54953, subsections (e)(1) and (e)(3), and in light of the State of Emergency proclaimed by the Governor on March 4, 2020 relating to COVID-19 and ongoing concerns that meeting in person would present imminent risks to the health or safety of attendees and/or that the State of Emergency continues to directly impact the ability of members to meet safely in person, the LACERS Benefits Administration February 28, 2023 meeting will be conducted via telephone and/or videoconferencing.

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LACERS Website Address/link:

www.LACERS.org

President: Nilza R. Serrano

Vice President: Elizabeth Lee

Commissioners: Annie Chao
Thuy Huynh
Janna Sidley
Sung Won Sohn
Michael R. Wilkinson

Manager-Secretary: Neil M. Guglielmo

Executive Assistant: Ani Ghoukassian

Legal Counsel: City Attorney's Office
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Counsel Division

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- VI. ADJOURNMENT

MINUTES OF THE SPECIAL MEETING
BOARD OF ADMINISTRATION
LOS ANGELES CITY EMPLOYEES' RETIREMENT SYSTEM

In accordance with Government Code Section 54953, subsections (e)(1) and (e)(3), and in light of the State of Emergency proclaimed by the Governor on March 4, 2020 relating to COVID-19 and ongoing concerns that meeting in person would present imminent risks to the health and safety of attendees and/or that the State of Emergency continues to directly impact the ability of members to meet safely in person, the LACERS Benefits Administration January 24, 2023 meeting will be conducted via telephone and/or videoconferencing.

January 24, 2023

9:31 a.m.

PRESENT via Videoconferencing:	Chair:	Michael R. Wilkinson
	Committee Members:	Annie Chao Thuy Huynh
	Vice President:	Elizabeth Lee
	Commissioners:	Sung Won Sohn Janna Sidley
	Executive Assistant:	Ani Ghoukassian
	Legal Counselor:	Miguel Bahamon
	Manager-Secretary:	Neil M. Guglielmo

The Items in the Minutes are numbered to correspond with the Agenda.

Commissioner Sohn and Commissioner Sidley joined the meeting at 9:53 a.m. and Vice President Lee joined the meeting at 9:56 a.m., and this was a Special Meeting of the Board of Administration. Any votes were taken by Benefits Administration Committee members only.

I

PUBLIC COMMENTS AND GENERAL PUBLIC COMMENTS ON MATTERS WITHIN THE COMMITTEE'S JURISDICTION AND COMMENTS ON ANY SPECIFIC MATTERS ON THE AGENDA
PRESS *9 TO RAISE HAND DURING PUBLIC COMMENT PERIOD – Chair Wilkinson asked if any persons wished to speak on matters within the Committee's jurisdiction, and there were no responses.

II

APPROVAL OF MINUTES FOR THE MEETING OF SEPTEMBER 27, 2022 AND POSSIBLE COMMITTEE ACTION – Committee Member Chao moved approval, adopted by the following vote: Ayes, Committee Members Chao, Huynh, and Chair Wilkinson -3; Nays, None.

III

HEALTH, WELLNESS, AND BUYBACK OPERATIONAL VERBAL UPDATE – Karen Freire, Chief Benefits Analyst, provided the Committee with an update and they discussed for 20 minutes.

Commissioner Sohn, Commissioner Sidley, and Vice President Lee joined the Meeting.

IV

PUBLIC SAFETY OFFICER, ENHANCED BENEFITS VERBAL UPDATE – Ferralyn Sneed, Chief Benefits Analyst, provided the Committee with an update and they discussed for 5 minutes.

V

OTHER BUSINESS –There was no other business.

VI

NEXT MEETING: The next Benefits Administration Committee meeting is not scheduled at this time, and will be announced upon scheduling. Please continue to view the LACERS website for updated information on public access to Board/Committee meetings while responding to public health concerns relating to the novel coronavirus continue.

VII

ADJOURNMENT – There being no further business before the Committee, Chair Wilkinson adjourned the Meeting at 9:59 a.m.

Michael R. Wilkinson
Chair

Neil M. Guglielmo
Manager-Secretary



COMMUNICATIONS & STAKEHOLDER RELATIONS FY 24 BUDGET REQUESTS

FY 24 DIVISION BUDGET - OVERVIEW

COMMUNICATIONS & STAKEHOLDER RELATIONS

The budget request for FY24 follows the establishment of the newly created Communications & Stakeholder Relations Division (CSRD) to continue the team's ongoing efforts in the Member Engagement and the Member Service Center Teams and support the addition of the Development & Marketing Section and the newly assigned duties from the Executive Team.

- CSRD will focus on internal and external communication functions and building stakeholder relations;
- Manage the Member Experience, Language Access Plan, Strategic Communications Plan, Branding, Crisis Communications;
- Coordinate Pension Symposiums and other outreach activities;
- Serve as the primary point of Member contact for general retirement inquiries
- Conduct and provide benefit seminars, produce content for LACERS' web-based platforms, engage hard-to-reach Members with informational benefit campaigns, and support department-wide initiatives; and
- Increase the LACERS' visibility and brand amongst its Members, peers, and stakeholders.

DIVISION BUDGET – NEW KEY ITEMS

MEMBER SERVICE CENTER

- ✓ 62,000 Member Inquires
- ✓ Occupancy Rate is 84.4% which is above the industry standard, this could lead to staff burnout
- ✓ Wait time for Members is above 2.5 minutes 49% of the time



DEVELOPMENT AND MARKETING TEAM

- ✓ Creation and Implementation of the Strategic Communications Plan
- ✓ Crisis Communication Plan
- ✓ Leveraging LACERS' Visibility

MEMBER ENGAGEMENT TEAM

- ✓ Department-wide Language Access Plan Implementation
- ✓ Member Experience Expansion
- ✓ Increasing seminar and event requests (96 projected FY23)



**WORKING
TOGETHER TO
SECURE
MEMBERS'
TOMORROWS!**

BUDGET REQUESTS - EXISTING

The CSRD is requesting to regularize several positions, including:

- (1) Chief Benefits Analyst who serves as the current Division Manager; and
- (1) Development and Marketing Director who oversees the Strategic and Crisis Communications Plan and the new Development and Marketing Section.

The CSRD is requesting to continue several sub positions, including:

- (1) Benefits Analyst within the Development and Marketing Team who plays a pivotal role in Member education, engagement, and content creation for the various communication pieces and web-based platforms; and
- (1) Admin Intern within the Member Service Center Team who handles much of the team's paperwork and assists on the 800 phone line.



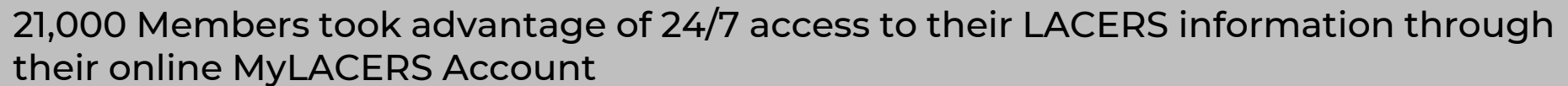
FY 21-22 HIGHLIGHTS



62,000 Total Member Inquiries; phone calls, emails, MyLACERS



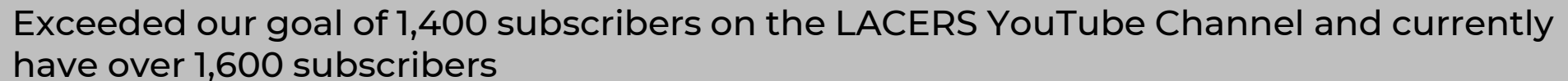
Started Phase 2 of the Retirement Application Portal



21,000 Members took advantage of 24/7 access to their LACERS information through their online MyLACERS Account



78 Seminars were conducted hosting over 1,800 participants



Exceeded our goal of 1,400 subscribers on the LACERS YouTube Channel and currently have over 1,600 subscribers



Established in-person appointment scheduling via Microsoft Bookings application

LOOKING AHEAD



- Retirement Application Portal (RAP) Phase 2; User Expansion
- Reintroducing in-person Planning for Retirement Seminars (Beginning in March 2023)
- Refreshed Member Service Agreement
- Expansion and refresh of LACERS YouTube Channel content
- Language Access Plan
- Cached Crisis Communication and Strategic Communications Plan



Retirement Services Division Budget Presentation

Fiscal Year 2023-2024

Presenters
Ferralyn Sneed and Delia Hernandez



MEMBER COUNSELING SECTION

**Disability Retirement
Service Retirement
Survivor Benefits**

**MEMBER SUPPORT and
RESEARCH SECTION***

**Benefits Determination
Legal Processing**

* Performance Review Unit to be added July 1st.

ACCOMPLISHMENTS

The current fiscal year has been dedicated to reviewing procedures and processes, conducting training and analyzing operations to determine where change and resources are needed to improvement operational efficiencies.

As of December 2022

02/28/2023

FY 2022-2023

YouTube Video on Disability Retirement Process
Webinar on Disability Retirement

Reinitiated Annual Department Personnel Director Presentation on Disability and LACERS Services

Staff Training

- Family Death Benefit
- Survivor Benefits Overview
- Management Controls and Process Management
- LACERS Tiers Comparison
- Benefits Analyst -Duties, Required Knowledge Base, and Expectations
- Benefits Specialist - Duties, Required Knowledge Base, and Expectations
- Being Proactive
- Active Listening
- Cross Training of Senior Managers (Service Retirement, Survivor Benefits)

Commissioner Training

- Disability Retirement
- Tier 1 Enhanced

Division Audits

- Domestic Relation Orders (DRO) Set-ups, review of 101 cases
- Business Plan Initiative (BPI) – Separation Incentive Program (SIP) Audit – On track
- Retirees with Funds on Deposit

Tax Compliance Review

Public Safety Officer Ordinance Review

Termination Letter Notification

DWP Reciprocity Review

Group Counseling

- Termed Council Office
- Mayor's Office -twice

Reviewing and requesting updated opinions City Attorney Opinions




GOALS

- **Maintain the Division's High Level of Performance Output**
- **Continue to Provide Exemplary Customer Service**
- **Deliver Benefits Accurately and Timely**
- **Train and Prepare the Next Group of Subject Matter Experts, Supervisors and Managers**
- **Ensure RSD Functions at Optimum Efficiency and Effectiveness**

CHALLENGES

- **Analyzing Operations**
- **Multiple Platforms with Limitations which Increase Manual Processing**
- **Key Staff Retiring in 5 Years or Less**
- **Loss of Institutional Knowledge**
- **Significant Percentage of Staff with Less Than Five Years Benefits Experience**
- **Overcoming Residual Affects of COVID**
- **Teaming Building Virtually**
- **Effectively Executing the Division Succession Plan**



Projects for FY
2023-2024

In The Queue

- Target Audits
- Termination Letter Notification
- Letter Standardization
- Retirement Application Portal (RAP) Scanning
- RAP Phase 2 Testing
- OnBase – Communication upload; emails, texts
- Beneficiary Forms – DRO Recipients
- Beneficiary Forms – Retired Members Pre-2015
- Overpayment Payment Analysis and Closeout
- Training Modules Continuation
- Business Intelligence Report Expansion
- Census Audit – Berwyn
- Complex Case Archive
- Closing the Gap on V3 Functionality and Operational Processes
- Public Safety Officer Phase II

02/28/2023

Proposed Budget Main Elements

New Requests

- Regularize the Benefits Analyst on the BPI Audit Team
- Add (1) Senior Clerk Typist for needed clerical support in Survivor Benefits instead of adding a Benefits Specialist
- Increase funding for training and training-related travel
- Increase funding for subscription services
- Increase funding for training modules

Proposed Offsets

- Reduce Disability Retirement Funding by \$50,000
- Reduce As-Need by \$29,000
- Reduce Investigative Services by \$20,000

Proposed Offset Expenditure Account History

	2020				2021				2022		
	Budgeted	Actual	Difference		Budgeted	Actual	Difference		Budgeted	Actual	Difference
Disability	185,000	156,397	28,603		207,000	121,990	85,010		200,000	84,514	115,486
Overtime	100,000	89,757	10,243		236,557	209,024	27,533		160,000	128,300	31,700
As-Needed	-	71,279	(71,279)		458,643	893,115	(434,472)		87,926	152,143	(64,217)
Contractual	26,480	15,880	10,600		15,000	5,201	9,799		25,000	504	24,496

Performance Review Unit

Division Wide



- Recent analysis of several benefit setup processes has identified the need to add an additional layer of checks and balances not provided by PAS functionality. This analysis was triggered by a case reviewed by Moss Adams.
- RSD intends to transition the BPI SIP audit team to a division-wide audit, research, and management support team. The new team, known as the Performance Review Unit (PRU) will conduct a full-scale review of all management controls and utilize process improvement strategies to evaluate processes, policies, and procedures to not only identify weak points and bottlenecks but ensure the Division is operating at optimal efficiency and effectiveness.
- The PRU will also assist units through their evaluative function and serve as a type of quality assurance check for how the Division delivers benefits.
- The BPI audit team has completed its review of the LSIP and HSIP focusing on member documentation. Early analysis has found name discrepancies, incomplete forms or missing forms and unsigned documents. The number is not significant but can impact or delay the delivery of a survivor benefit.
- The PRU will be composed of a Benefits Analyst and two Benefits Specialists.



Senior Administrative Clerk

- Survivor Benefits processes on average 5095 (inclusive of all beneficiaries) cases per year. This is outside of other duties the unit is tasked with undertaking, such as review of beneficiary forms and the associated requisite follow up, as well as Accurant searches and mailings.
- In order to improve efficiency and allow counselors to focus on counseling and processing benefits, RSD is proposing to add a clerical position to support counseling staff by relieving them of time-consuming clerical tasks. These tasks include in addition to duties mentioned above: preparing the approved benefits roster, distribute A & Cs, assist with monthly stats, sort mail, and assist with front-end scanning.
- RSD is recommending funding the position through offsets to other budget line items.

02/28/2023

Survivor Benefits Unit



Examples of Clerical Tasks Performed by SBU Benefits Specialists

	2020	2021	2022
Beneficiary Forms	1172	944	999
Mail	1030	2436	2015
Accurant Searches	3636	2979	3257
Total	5838	6359	6271

TWO YEAR STAFFING PROPOSAL*

*Limited Position funded through December 2021, never filled

**Limited Positions used for processing SIPs and SIP audit (pending)

***Workload would determine the need for subauthorities

	Current Unit Staffing Reg Sub	2022-2023 Reg Sub	2023-2024*** Reg Sub	Proposed Staffing
BDU	9 0	9 0	9 0	9
LPU	4 1 *	5 0	5 0	5
SBU	6 0	7 0	9 0	9
SRU	11 5 **	12 3	13 0	13
Other Staff	18 6	18 3	18 0	18
Total	48 6	51 3	54	54

- Proposal restructures units to maximize efficiency for additional layer of audit oversight and senior level analysis
- Implements succession plan objectives to ensure RSD does not experience a knowledge or skill deficit that could impact divisional performance objectives and the delivery of benefits
- Maintains RSD's high-performance level and meeting the strategic goals of accurate and timely delivery of member benefits and outstanding customer service



Thank you

Presenters

Ferralyn Sneed and Delia Hernandez

The End





Health, Wellness, and Buyback Division (HWABD)

FY 2023-24 Budget

HWABD Accomplishments – General

- **Health Advocacy Unit pivoted** from passive counseling to active counseling for New Retirees and Survivors
- **Health Enrollment Unit processed** 8,000+ enrollment transactions in 2022
- **Wellness witnessed a growth** of 103% of program participants from 1,394 in 2021 to 2,832 in 2022
- **Service Processing Section reduced** backlog by 19%, **decreased** aging cases (cases pending more than 6 months) from 188 to zero, and **reduced** wait time by 58% from 12 months to 5 months
- **Completed** transition to Anthem Medicare Preferred PPO plan
- **Completed** the Health Insurance Portability and Accountability Act (HIPAA) regulatory compliance review which showed LACERS Health was in full compliance and no additional compliance was required
- **Conducted** a robust Health Consultant Request for Proposal (RFP)
- **Progressed** in succession planning:
 - Added Senior structure to Health and Buyback sections
 - For additional oversight, and
 - Transfer of knowledge to alleviate loss of institutional knowledge from retirements and attrition

HWABD Accomplishments – Efficiencies

- **Incorporated and maximized** use of new technology software and applications
- **Re-organized** processes and assignments:
 - Health Enrollment and Advocacy units coordinated the creation of a counseling checklist for counseling and enrollment
 - SPS created a counseling checklist for consistent quality counseling and delivery of information
- **Re-structured and re-organized staffing:**
 - New senior staffing structure created resulting faster response time to high-level issue cases
- **Adopted, reviewed, and modified policies:**
 - Regular assessment of policies, procedures, and processes has increased identification of inefficient processes, resulting in efficient and timely delivery of benefits
- **Improved collaborations** with Retirement Services Division, Member Services Center, and Member Engagement in relation to counseling and inter-sectional/divisional member-related transactions
- **Provided training and communication:**
 - All Sr. BA I and BAs in Health units were trained on the Medical, Dental, and Vision Plan renewal process
 - Sr. BA I in SPS was trained on high-level assignments and projects that resulted in faster review and response of complex cases

HWABD Challenges

- **Increase in complexity and heaviness of workload** resulting from a combination of:
 - Benefits administration complexity compounded by processes, training, and workload
 - Inadequate resources to maintain workload rate that is at appropriate workload-per-staff ratio for individual, section, and division health
 - Multiple special projects taking place, simultaneously and/or in succession
 - Increased health benefits subscribers and covered lives impacts Health units
- **Succession planning**
 - Inadequate staffing has limited the strength and transfer knowledge of experienced managers and staff, including developing and providing opportunities for analytical and leadership skills in staff
- **Staffing challenges**
 - Retention, recruitment, staff burnout/morale issues due to high workload
- **Loss of opportunity** to fully avail carrier and non-carrier program offerings related to Wellness programs focused on senior preventative care and disease management

HWABD FY23-24 Budget Request Summary

Since 2013, **Medical and Dental Covered Lives** increased by **33%**, from 35,925 to 48,306

As a result of this increase, the following areas of HWABD have been impacted:

- **Counseling** – **9%** increase since 2018 in number of cases per month per Advocate staff (from 47 cases to 51 cases)
- **Enrollment** – **130%** increase since 2013 (from 3,547 to 8,171) and **3%** increase compared to pre-SIP 2019
- **Contacts** – **24%** increase since 2019 (from 19,825 to 24,659)

HWABD FY 2023-24 BUDGET REQUEST (PART OF A MULTI-YEAR PLAN)				
NEW POSITIONS	ADVOCACY	ENROLLMENT	ACCOUNTS RECONCILIATION	WELLNESS
BENEFITS ANALYST	1	1	1	0
SR. BENEFITS ANALYST	0	0	0	1
TOTAL POSITIONS	1	1	1	1

Additionally, HWABD is requesting for the following:

- **Regularization of Substitute Authority Positions** (6 in Health and 2 in Buyback)
- **Continuation of 2 Sub-Authorities in Wellness, and funding for 13 Part-Time Positions** (2 of which are Wellness funded)
- **Overtime of \$105,000** (\$55,000 for Health, and \$40,000 for Buyback)
- **Training of \$13,300**

HWABD Staffing Proposal

Health & Wellness

Benefits Delivery

Customer Service

Fiscal Year	2022-23	Change	2023-24	Change	2024-25	Change	2025-26
Health Administration Support	7	0	7				
Advocacy Unit	5	+1	6	+3	9	+2	11
Enrollment Unit	7	+1	8	+3	11	0	
Accounts Reconciliation Unit	5	+1	6	+1	7	+1	8
Medicare Compliance Unit	2	0	2	+1	3	0	
Health Subtotal (less Health Admin)	19	+3	22				
Wellness Program	3	+1	4	0		0	
Wellness Subtotal	3	+1	4				
Buyback Administration Support	3	0	3	0		0	
Service Purchase Section	13	0	13	0		0	
SPS Subtotal	16	0	16				
HWABD Staffing Grand Total	45	+4	49				

The “Change” column for 2023-24 reflects the additional staffing needed to meet program objectives and operational efficiencies.

HWBAD will assess staffing needs yearly and based on comprehensive analyses. Therefore, the subsequent FY25 and FY26 may not be the official requests for those periods.

Health Advocacy Unit: Caseload Analysis

	LACERS Health	LACERA	LAFPP	SCVTA-ATU Local 265 Pension Plan	SDCERS	WPERP
Average Monthly Counseling Cases per Counselors	51	Currently 29; additional counselors will result to 25	14	1; increases to 2-3 Dec-Jan	13	5
No. of Counselors	4 but only 3 active	12; will be 14	7	5	3	7
No. of Subscribers Enrolled in Agency-Administered Health Plans	16,835 (as of 6/30/22)	37,390	11,628 in LAFPP Board-approved health plans (as of 6/30/22)	1,830 in CalPERS medical plans (as of 6/30/22)	~4,300 in City of San Diego health plans	8,432 (as of 6/30/21)
Counseling Information	<p><i>Retirement and health counseling conducted separately.</i></p> <p>LACERS Health counseling consists of: *New Retiree Health *New Survivor Health *Medicare Age-In *Health Enrollment Qualifying Events</p>	Health counseling is a part of retirement counseling.	<p>Retirement and health counseling are conducted separately.</p> <p>LAFPP retirement counseling consists of: *DROP entry *DROP exit *Service Pensions</p>	Retirement counseling includes general health information regarding CalPERS medical plans.	Individual counseling sessions for each retiree covering all aspects of retirement, including health.	Retirement and health counseling are conducted separately

Wellness Section: Programming Comparison

PLANNED vs ACTUAL PROGRAMMING FOR 2022

Online

- **36** Technology, Fitness, Brain Health Classes
- **30** Aging Mastery Classes
- **26** Informational Webinars
- ~~6~~ **3** Online Open Enrollment Meetings
- **6** Online Champion Activities

- **2** Newsletters

In-Person

- **7** In-Person Champion Activities
- **1** In-Person Gathering (Fitness Class Hike/5k)

Total: 109 events/classes/activities and 2 newsletters

All planned events were executed, with exception of Open Enrollment Meetings which consolidated from 6 to 3.

PLANNED PROGRAMMING FOR 2023 (without additional staffing)

Online

- **36** Technology, Fitness, Brain Health Classes
- **20** Aging Mastery Classes
- **26** Informational Webinars
- **3** Online Open Enrollment Meetings
- **8** Online Champion Activities

- **2** Newsletters

In-Person

- **9** In-Person Champion Activities
- **4** Gatherings (AMP Reunion, Hike/5k, Gala, Extravaganza)
- **3** In-Person Open Enrollment Meetings

Total: 109 events/classes/activities and 2 newsletters.

If additional staffing is approved, Wellness is expanding it's non-profit and carrier-provided programs.

Baseline Information affecting Health (1/8)

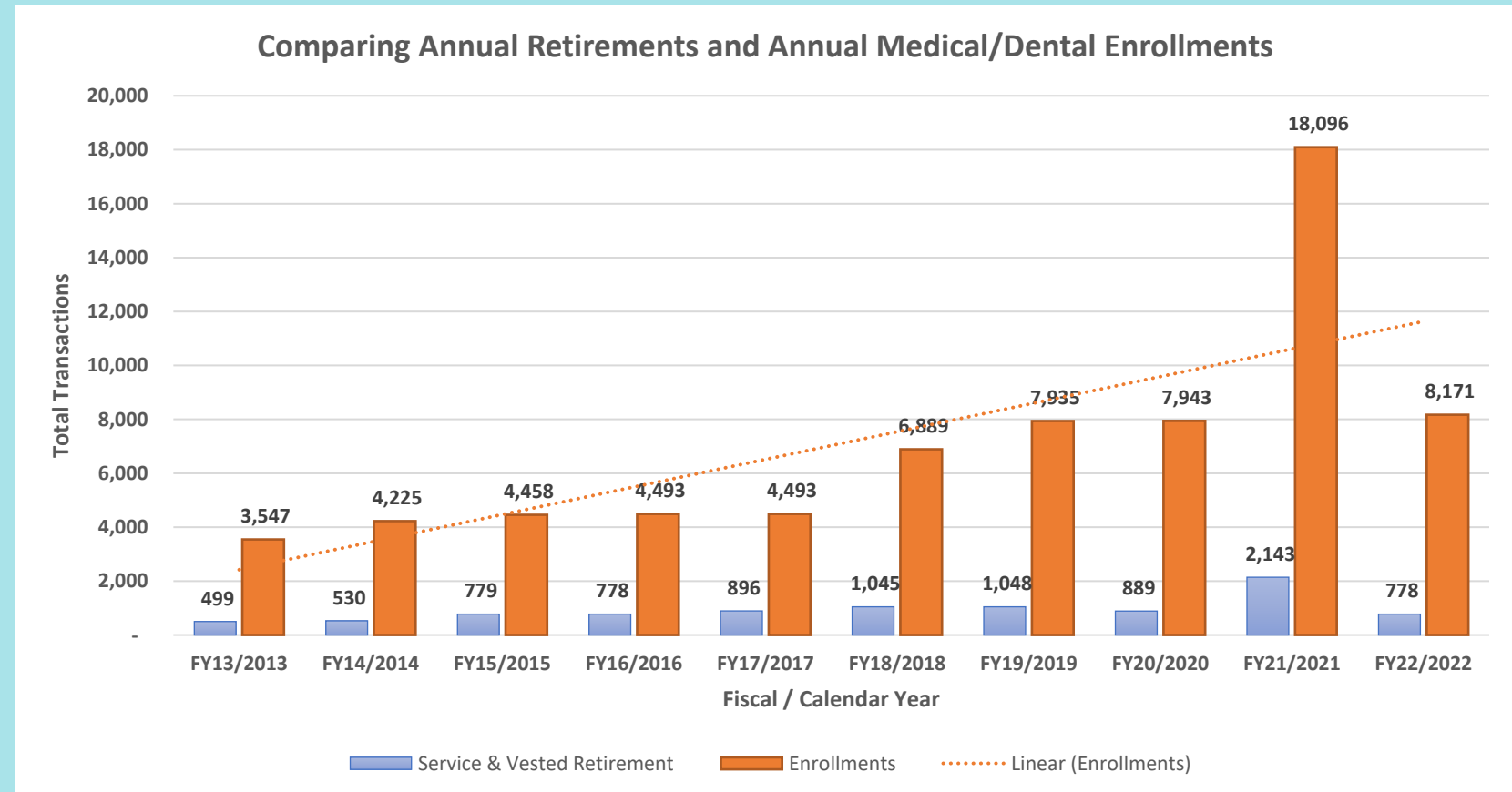
Both retirements and health enrollment transactions spiked in FY2021-22 and 2021, respectively, due to Citywide Separation Incentive Programs (LAWASIP, CSIP, Harbor SIP), employees retiring, and retirees relocating during the pandemic.

Health enrollments consist of:

- New Retirees and Survivors,
- Qualifying event plan changes,
- Disenrollment/terminations,
- Elections during Open Enrollment for next plan year

* Annual Retirements are reported by Fiscal Year while annual Medical/Dental Enrollments are by Calendar Year.

Enrollments increased 130% since 2013; 3% compared to pre-SIP (2019)



Baseline Information affecting Health (2/8)

Although retirements are one per Member:

- Retired Members receive **minimum one to two** Health counseling sessions (Health and/or Medicare Age-In)
- Retired Member may have **multiple** health enrollment transactions *per year and lifetime*
- Survivors receive **minimum one to two** Health counseling sessions (Health and/or Medicare Age-In)
- Survivors may have **multiple** health enrollment transactions *per year and lifetime*

A Subscriber can experience and act on one or more qualifying events in a calendar year and lifetime.

Qualifying Event	Special Enrollment Period
Turning age 55	Within 60 days
Turning age 65	Within 90 days
Relocation into/out of HMO plan zip code service area	Within 30 days
Involuntary termination from non-LACERS medical plan	Within 30 days
Family status change	Within 30 days

Baseline Information affecting Health (3/8)

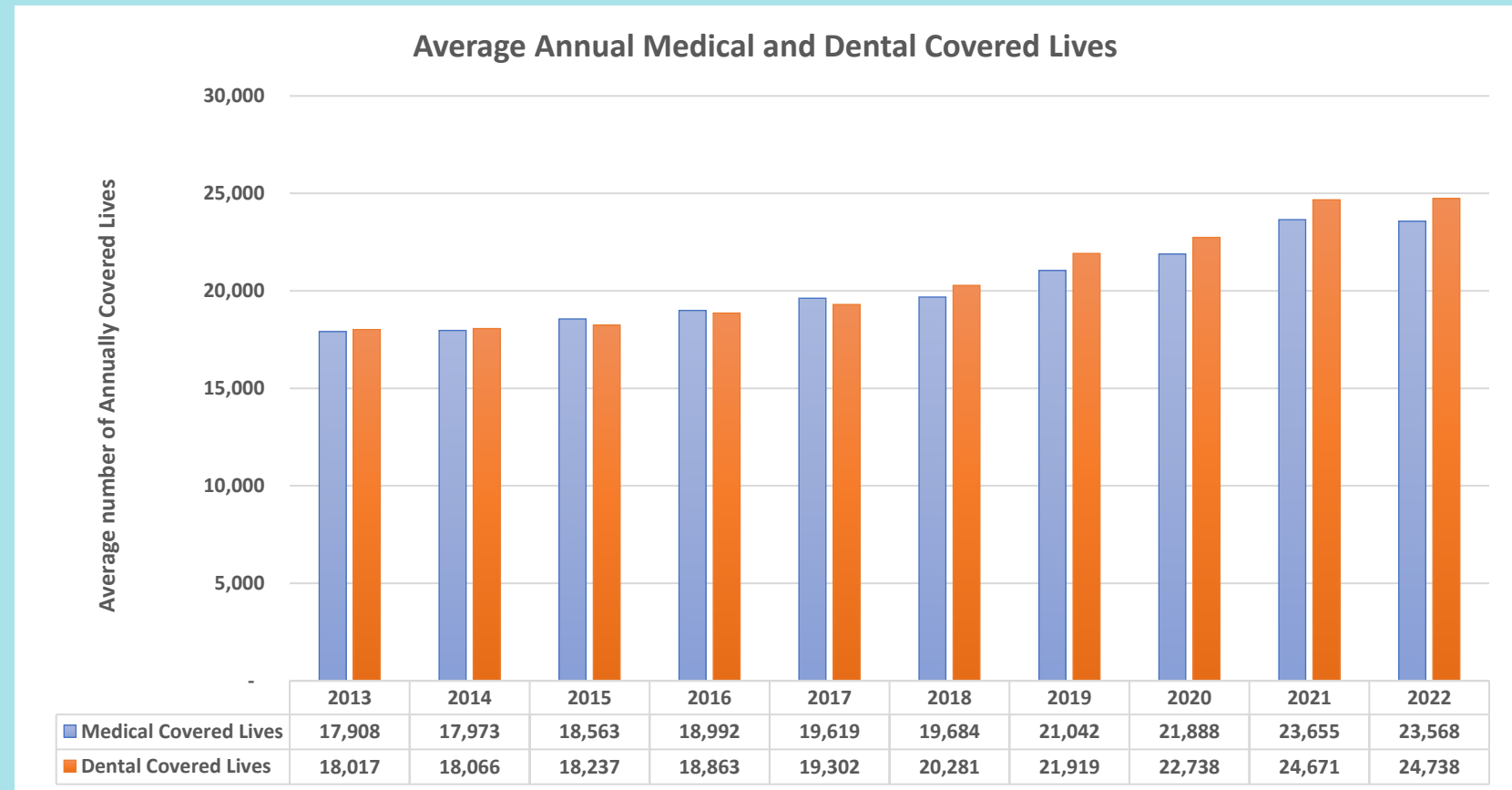
Medical and Dental Covered Lives are in an upward trend:

- More new Retirees and/or Survivors covering dependents
- Subscribers living longer

Although not every Retired Member nor Survivor chooses to enroll in LACERS' medical plans, if eligible they may participate in LACERS' Medical Premium Retirement Program (MPRP).

Covered Lives does not include MPRP participants.

Covered Lives rose **34%** since 2013, or average **3%** increase per year



Baseline Information affecting Health (4/8)

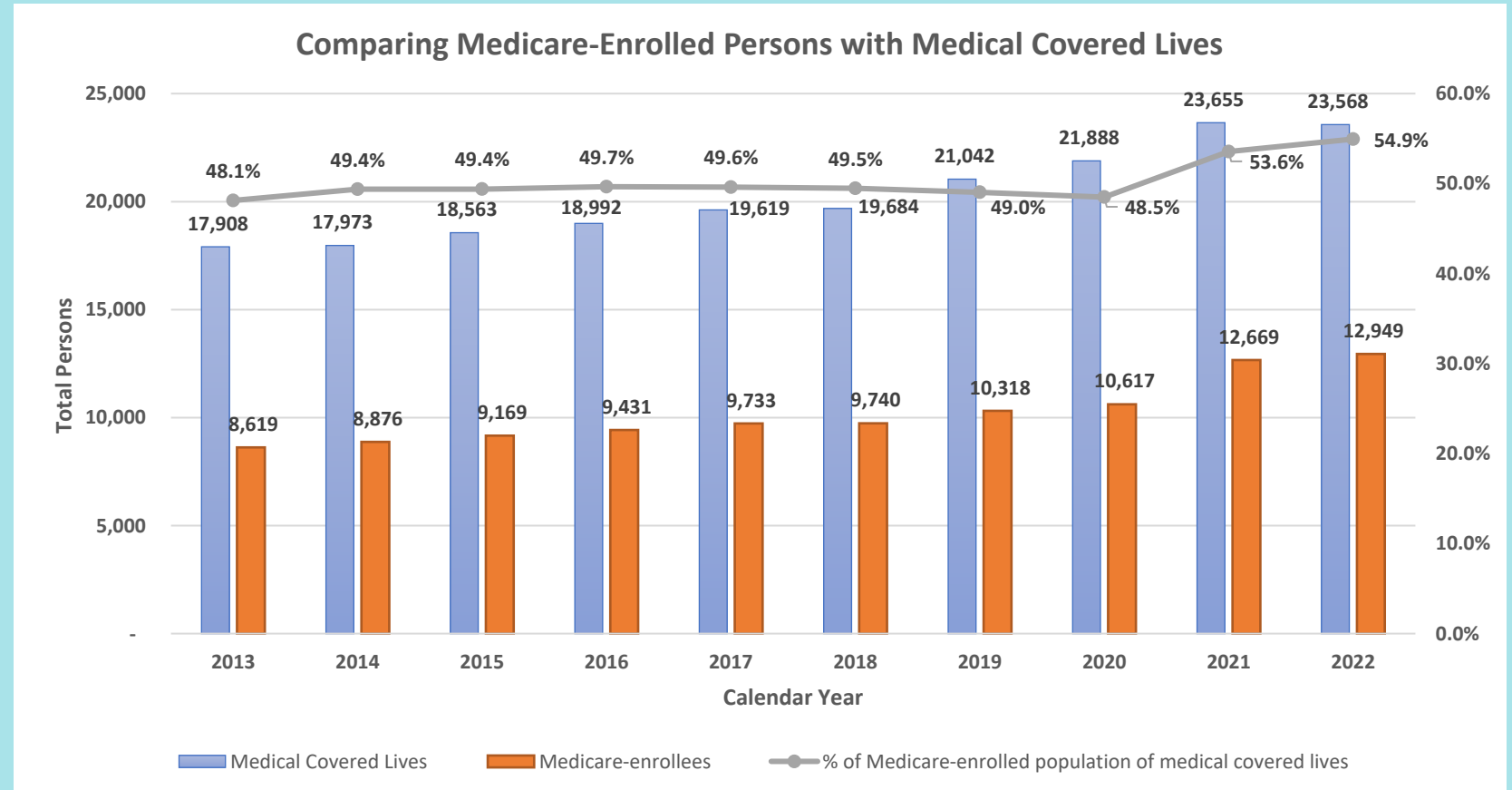
Medicare-Enrolled Covered Lives includes:

- Members,
- Survivors, and
- their eligible Dependents such as spouses, children, and disabled adult children.

LACERS Medicare-enrolled population are those with Medicare Part A&B and B-Only.

This chart does not include MPRP participants nor MPRP participants' dependents who have Medicare.

55% of 2022's Medical Covered Lives have Medicare



Baseline Information affecting Health (5/8)

The majority of LACERS' medical Subscribers have Medicare. As of December 2022, the average age of a LACERS medical subscriber is **72 years and 9 months old**.

Generally, the older the subscriber is, the higher the likelihood the subscriber wants to communicate the way they know best, which generally does not include the use of new technology. The current older individuals prefer in-person and phone/fax communication. Therefore, current efforts to implement and/or utilize "new" technology may not help this group. Moreover, the significant efficiencies LACERS staff would experience will not be realized until the next generation of subscribers.

Currently, LACERS' subscribers are in these social generations:

- Greatest Generation: 1901-1927 (29 subscribers)
- Silent Generation: 1928-1945
- Baby Boomer: 1946-196
- Generation X: 1965-1980
- Generation Y 1981-1996 (1 subscriber)

Type	Total Count	Have Medicare	Medicare Population Percentage
Retiree	15,057	11,315	75.1%
Survivor	1,802	1,634	90.6%
Subscribers	16,859	12,949	76.8%

MEDICAL SUBSCRIBER AGE GROUPS		
	#	%
40-50	9	0.05%
50-60	1,179	7.00%
60-70	5,827	34.56%
70-80	6,213	36.85%
80-90	2,847	16.89%
90-100	755	4.48%
100-110	29	0.17%
Grand Total	16,859	100.00%

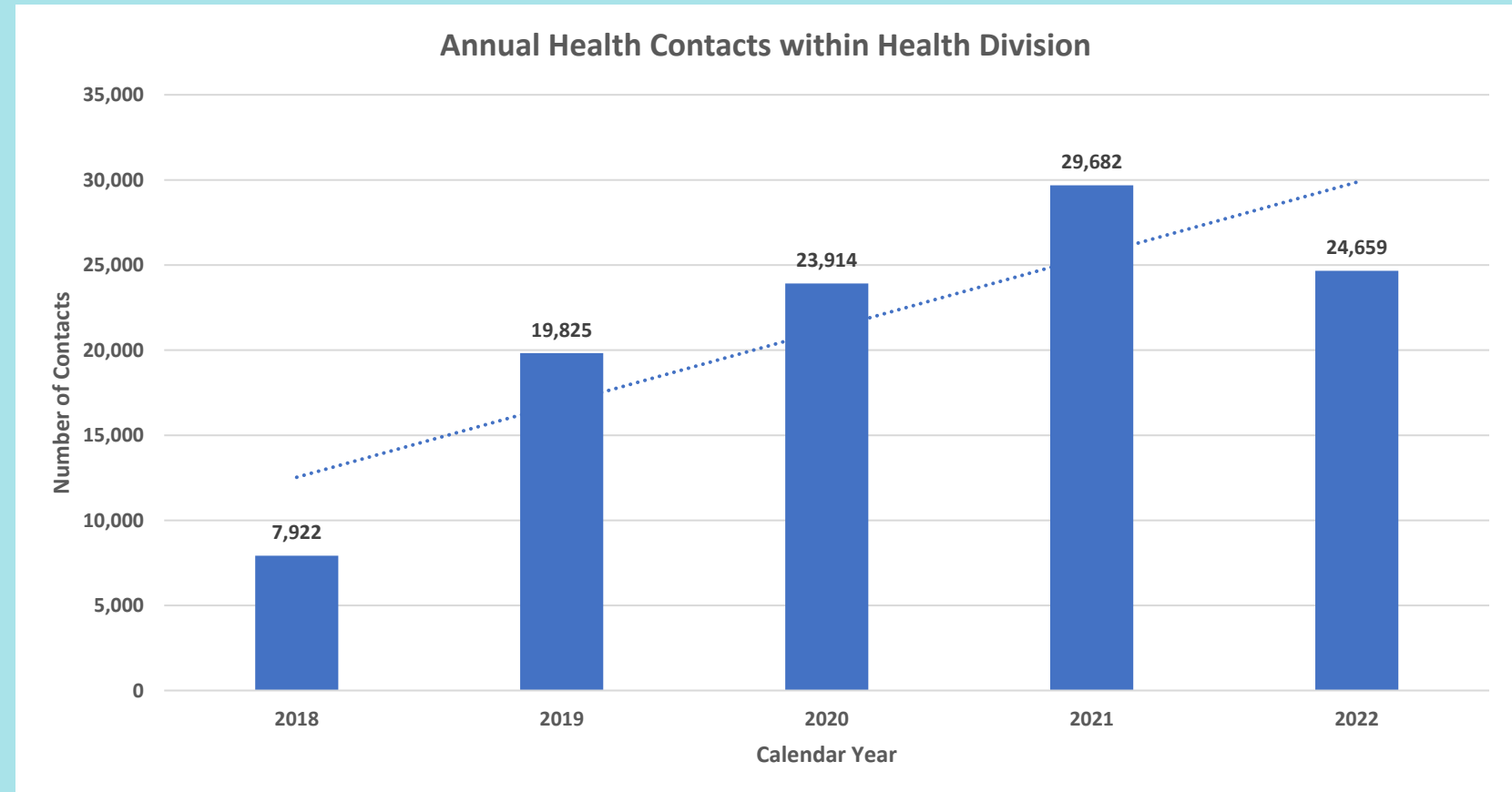
Baseline Information affecting Health (7/8)

Contacts to Health include phone calls and email correspondences.

Staff began recording contact logs in late-2018, with 2019 being the first full year of record.

These numbers are as accurate as staff self-record in PensionGold.

24% more contacts with Members/Survivors than 2019



Baseline Information affecting Health (8/8)

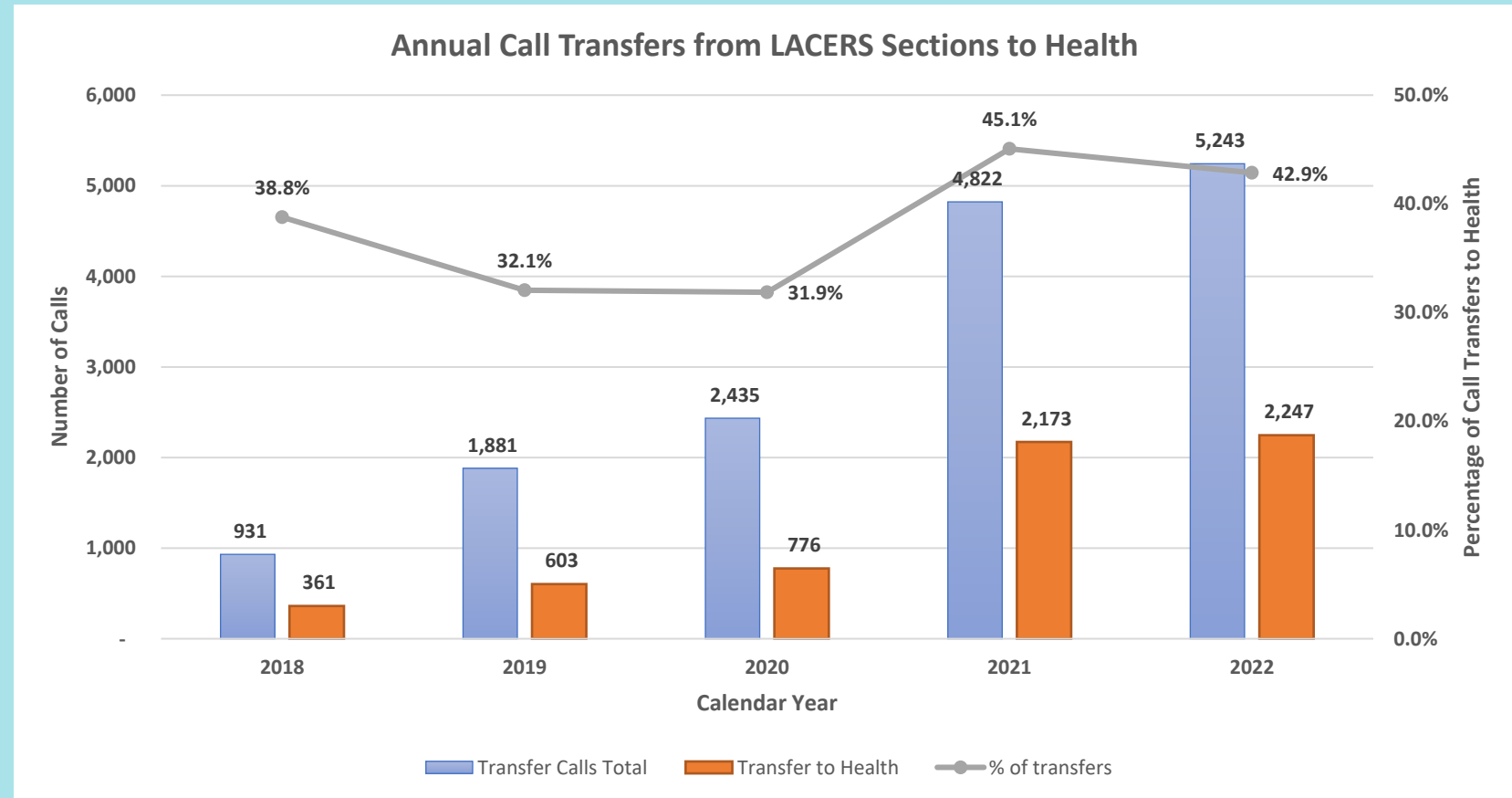
Health receives call transfers from other LACERS sections at Member's request or due to complexity of health benefit/enrollment.

In 2022:

- **5,243** total call transfers
- **2,247** call transfers to Health
 - 2,230 from MSC
 - 17 from AMA, MPU, SRU

These numbers are as accurate as LACERS staff self-record in PensionGold.

43% of transferred calls were sent to Health units this year



HWABD FY23-24 Budget Presentation

QUESTIONS?