



## Retirement Plan Services

# Milwaukee County

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### ACTION REPORT

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TO: Chairman Theodore Lipscomb, Sr., County Board Chairman

FROM: Amy Pechacek, Interim Director, RPS

RE: Request for 1 FTE –Clerical Specialist / Pension Administration

DATE: 1/12/2018

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#### **I. BACKGROUND**

In April of 2014, Corporation Counsel and Pension Board counsel submitted a supplemental Voluntary Correction Plan ("VCP") to the Internal Revenue Service ("IRS") regarding additional pension calculation errors and the proposed correction methodology. The outside auditing firm of Baker Tilly was engaged under a three part audit to assist in research required to complete the VCP and in a consulting capacity to make operational recommendations to help reduce future administrative error risk. The three audit phases were presented to the Pension Board, the County Board's Finance and Audit Committee, and the County Board's Personnel Committee Please see files #17-154, 17-166, 17-243, 17-321, 17-340, 17-405, 17-532, 17-567, 17-659, and 17-727 for details.

Phase 3 of the Baker Tilly audit documented the complexity of operational risks associated with the administration of the County's pension benefits and provided recommendations related to process documentation, internal auditing, segregation of duties, and quality assurance. Additional Retirement Plan Services (RPS) staffing resources are needed to build on this framework and implement the recommended risk mitigation efforts to increase the efficiency and accuracy of benefit administration. RPS is requesting two additional positions, a Senior Pension Research & Compliance Analyst and a Clerical Specialist. Please see the associated Senior Pension Research and Compliance Analyst request for further details.

## II. RECOMMENDATION

RPS recommends that the County Board authorize the addition of the following position to be dedicated providing all aspects of clerical support:

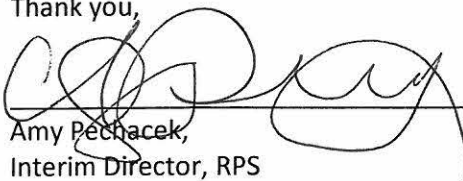
Title	No. of Positions	Title Code	Pay Grade
Clerical Specialist	1.0 full-time equivalent	00000035	05PM

The Clerical Specialist will be primarily dedicated to the following duties:

1. Pension administrative support- provide all aspects of clerical support to RPS including, but not limited to, customer service support, data entry, copying, filing, data research, answering basic retirement questions, and execution of mass mailings
2. File maintenance- maintain the RPS file room and recording keeping process, including scanning and document preservation
3. Customer service- answers incoming inquiries (calls, email, fax, mail, in person) and redirect or escalate, if needed. Assist retirees with V3 self-service questions, form completion, etc.
4. Data collection- assists analysts and other RPS members in locating and gathering historical data including payroll records, City/State service histories, etc.
5. Data entry - process retiree transactions related to direct deposit, status changes, address changes, withholding changes into the V3 system for ERS and OBRA members. Review and process employee and retiree information from lists and forms and any and all other required data entry

This position may also be assigned special projects and other duties as deemed necessary and appropriate.

Thank you,



Amy Pechacek,  
Interim Director, RPS

cc: Chris Abele, County Executive  
Scott Manske, Comptroller  
Kelly Bablitch, Chief of Staff, County Board of Supervisors  
Raisa Koltun, Chief of Staff, County Executive  
Steve Cady, Research & Policy Director  
Margaret Daun, Corporation Counsel  
Jim Carrol, Principal Assistant Corporation Counsel  
Kerry Mitchell, Director, Dept. Human Resources  
Teig Whaley-Smith, Director, DAS  
Norb Gedemer, Pension Board Chairman  
Laurie Braun, Pension Board Vice Chairperson  
Michael Harper, Pension Board Audit Committee Chairman