



## MARIN COUNTY COMMUNITY FORUM ON SUSTAINABLE PUBLIC PENSIONS – POST EVENT REPORT



### EXECUTIVE SUMMARY

On April 3, 2012, the County of Marin convened an educational public forum on Sustainable Public Employee Pensions for Marin County government. The Board of Supervisors adopted guiding principles on pension reform and endorsed the Governor’s 12-point plan in December 2011. While the state is debating the components of the plan, the County took the opportunity to engage and educate the public on pension reform and gather feedback on possible next steps.

While some skepticism was expressed before the forum took place about the proposed format, on balance, the feedback from most participants was appreciative and positive. Close to 200 people attended, inclusive of volunteers, staff and panelists. Prevalent feedback was that the forum was successful in creating a broader platform of public understanding, and participants gave positive reviews of the material presented and panelist presentations. Participants also provided suggestions for next steps via worksheets and questions. A summary of comments and submitted questions are included in the Appendix of this report. The Institute for Local Government, a research and education affiliate of the California Association of Counties (CSAC, attended the forum and will soon be publishing a detailed article about how this forum could be a model for other local governments on this topic.

The County is using its webpage dedicated to pensions ([www.marincounty.org/Main/Pensions](http://www.marincounty.org/Main/Pensions)) as a venue to post all the information provided at the forum, including a video of the event. Many more questions were written and submitted that evening that were able to be asked, but all questions and responses (which are still in process) will be posted to the website.

### BACKGROUND

The following debrief report provides:

1. Description and background
2. Summary of feedback on its structure, process and educational materials to inform future public engagement activities
3. Suggestions for possible next steps in pension reform.



## FORUM PURPOSE

The intent of the forum was to

- Develop a shared understanding on how Marin’s pension system works and what options are available to make changes
- Provide different perspectives about types of changes that can be made to achieve a “sustainable” program
- Understand what information is generally agreed upon, where there are differences of opinion and ideas of possible next steps

## PARTICIPATION

Approximately 190 individuals attended the three-hour forum, of which about 25-30 were involved in staffing the event or providing facilitation. 57 participant worksheets were returned. Of those, 48 identified themselves as interested community members (50%), employees of the County or other public agencies (29%), County retirees (4%), members of the Citizens for Sustainable Public Pensions (8%) or other (8%)

## FORUM STRUCTURE AND FORMAT

To fulfill the purposes outlined above, the forum had the following elements:

- a welcome from President of the Board of Supervisors Steve Kinsey, clarifying the educational purpose of the forum
- a “Pension Basics” PowerPoint presentation, designed to establish a common “baseline” of information (complemented by an overview “Basic Facts About Pensions” document provided to all attendees and sent to those who registered ahead of the meeting)
- a six-member panel of a wide range of opinions with individual presentations, followed by questions/answers taken on index cards to accommodate an anticipated, large number of questions
- brief table discussion in which attendees were asked to come up with their most significant question for any or all of the panelists
- brief final comments by the panelists and closing comments



The Pension Basics was presented by Susan Clark of Common Knowledge, who also facilitated the forum. The League of Women Voters of Marin and other community volunteers were prepared to provide table facilitation for a lengthier group discussion, which was changed during the forum to accommodate more questions from the attendees.

Questions were taken via index cards at each table; questions were grouped and sorted by the League of Women Voters and asked of the presenters. Many more questions were written than were able to be asked. All questions have been collected and responses will be posted to the County's website. The entire event was videotaped for posting to the County's website.

#### FORUM PLANNING PROCESS

To ensure primary stakeholders were involved in the forum, a working group was developed in late fall 2011 to plan the forum. The planning group consisted of representatives from three County employee labor groups, representatives from Citizens for Sustainable Public Pensions (CSPP), and the County Administrator and Chief Assistant County Administrator. The County had held a forum in spring 2011 that provided largely technical information, had no facilitator or moderator, and did not provide sufficient time for questions and answers.

To improve upon the earlier forum, the County hired Common Knowledge, an organization specializing in nonpartisan public education and engagement, to assist with the planning, event facilitation and materials, and to provide a model and templates for future community engagement efforts, as proposed in the County's recently adopted Public Communications Plan.

The planning group developed a format that would provide for participant discussion as well as panel presentation and question/answers. The group also requested a neutral location to broaden the audience (not a County facility) and neutral presenter of the basic information to ensure fairness and balance. Uncertain of the format involving small group (table) discussion, which was planned in addition to the traditional speakers and question/answers, the CSPP withdrew from the process. One resident, however, continued on the working group, providing a knowledgeable and independent resident perspective. Together, the planning group created a shared PowerPoint presentation "Sustainable Public Employee Pensions" and also an easy to read "Basic Facts about Pensions" publication.





## OUTREACH

The County sent emails to non-profit organizations, public agencies, chambers of commerce, local newspapers, service clubs and County employees advertising the event. In addition, an OpEd was written in the Marin Independent Journal, as well as press releases to major news organizations, which carried information or stories about the event. The notice was also resent or incorporated by other organizations to their members (such as City of San Rafael, the Center for Volunteer and Nonprofit Leadership and the League of Women Voters). The Marin IJ also provided its own editorial. RSVPs were requested but not required to ensure sufficient refreshments; the County expected 100 people at the event, but close to 200 attended. The composition of the attendees represented a greater cross section of the community than at the prior pension forum.

## SUMMARY OF FEEDBACK

Feedback was requested from the community about what additional questions they wanted answered, what suggestions they had for the County about action on pensions, what they thought about the forum and how else they wanted to see future community engagement on this issue. Because this session was modeling future public engagement, input was received in multiple ways:

- 57 participant worksheets were returned (although not all people filled out all the questions), representing about a third of the attendees not directly related to the event staff, panelists or volunteers
- all 10 table leaders provided post-forum evaluation forms
- staff review of the questions submitted on cards
- verbal feedback from participants, key stakeholders and local media
- staff debrief meeting with the planning group

The prevalent feedback was that the forum was successful in creating a broader platform of public understanding for future Board action. On the worksheets and verbally, participant ratings were positive



on “providing basic information,” and in particular the panelists’ presentations, basic facts PowerPoint, and closing comments. See Appendix for detailed responses from the participant worksheets. Several attendees provided unsolicited thanks to the County for sharing the information and multiple perspectives.

Some attendees had wished that this event had focused more on debate about specific options. They and others also expressed some frustration that not all questions could get answered in the session. While most of the event logistics were seen as successful (the setting, the information provided), there were opportunities to improve details in the future (e.g. legibility of the screen, fewer loose papers, etc.).

The County is using its webpage dedicated to pensions ([www.marincounty.org/Home/Main/Pensions/](http://www.marincounty.org/Home/Main/Pensions/)) as a venue to post all of the information provided at the forum, video of the presentations as well as a place to post the unanswered questions and invite new ones. Responses to questions are in process. This site can also provide community information about upcoming Board discussions.

## SUGGESTIONS ON POSSIBLE NEXT STEPS

Participants were asked to provide possible next steps and suggestions to the County. Some suggestions were gleaned from other questions or comments given. Primary categories are shown below with the general range of recommendations given.

### *TAKE ACTION ON A HYBRID PLAN OR A DEFINED CONTRIBUTION PLAN*

Suggestions included bargain with unions on a hybrid plan for new employees and/or existing employees; start now and get legislation; investigate and interview cities that have failed instituting hybrids; don’t rely on hybrids as they and defined contribution plans are not the way to go; be wary of defined contribution fund managers looking for new business. Implement a “401-k type and social security only” plan for new employees.

### *PARTICIPATE IN SOCIAL SECURITY*

Some suggested included requiring participation in social security to spread risk, to align to the private sector; participating in Social Security to protect lower wage employees.

### *ESTABLISH RETIREE HEALTH TRUST AND DEFINE SUSTAINABILITY/FINANCIAL HEALTH*

Questions were asked about why health care debt was not under discussion; a recommendation was to establish a trust. Additionally, some suggestions included having a discussion of what “sustainable”

means and what government services are wanted; what tradeoffs might be; downsize government and outsource to tighten belt; declare bankruptcy

#### *LIMIT PENSION BENEFITS AND RAISE THE RETIREMENT AGE*

Responses including placing a cap on pensions for all levels; capping to \$100,000 and setting up 401Ks for those who earn above that amount; and fixing the benefit calculations so that high-earning employees don't end up with exorbitant pensions. Other suggestions were to offer retirees a lump sum payoff today to limit long-term risk; use the last 10-years of salary to calculate pension benefits; reduce benefits for highest paid retirees; tax pensions at a higher rate; and disallow government retirees to work as a consultant for the government, except for limited amount of time. Suggestions were made to increase retirement ages.

#### *ENSURE EMPLOYEE FAIRNESS*

Recommendations included ensure a level playing field by working with Marin towns/cities so there is consistency; recognizing that individual employee groups differ in different agencies, as not all towns/cities are the same; treat employees fairly and don't take away what was promised; and make changes only to future employees.

#### *CHANGE/EVALUATE THE MCERA INVESTMENT (DISCOUNT) RATE*

Suggestions included change the discount rate to 4 to 5%, per Joe Nation; change it to 5 to 6% to eliminate generational transfer; ensure there are employer contributions in good times; and establish actuarially how much a pension plan needs to be funded – what is the right percentage?

#### *TAKE LEGISLATIVE ACTION OR SUPPORT THE GOVERNOR'S PLAN*

These included: lobby Sacramento for state action; implement the Governor's plan now; be more active and supportive of it; implement Denis Rice's plan; amend the State Constitution to reduce vested benefits.

#### *REDUCE, FREEZE OR REVIEW EMPLOYEE SALARIES AND/OR COMPENSATION; LOOK AT TOTAL COMPENSATION*

Suggestions included : cap all employee COLA increases until funding is at 80% of funded liabilities; take the risk of freezing salaries and lowering benefits to see if there is really a problem with recruiting; reduce Safety employee payout; calculate total compensation for public employees then compare with private or other public agencies; address non-vested current employee pensions and change current employee packages; pay employees "market rate" rather than deferring compensation to pensions and future generations; phase out employer pick up of employee pension costs throughout Marin towns and special districts; have equal sharing of pension costs( per Governor's plan); clearly define difficulty in comparing public with private sector salaries

#### *HAVE MORE OPEN DEBATE AND DISCUSSION ON THIS*

Suggestions included holding an "Open House" combined with town hall for constructive discussion; allow for more open discussion at forums; have a "real" pro and con debate.

#### *CHANGE SYSTEMS REGARDING EMPLOYEE LABOR UNIONS*

Some suggestions included eliminate campaign contributions to Board of Supervisor members from unions; disallow unions to negotiate pensions or health care - just salaries; eliminate unions.

### *ADDITIONAL ISSUES/CONCERNS*

Additional issues or concerns raised but not necessarily as a next step or recommendation for action included the following: there is still disagreement about the facts –whose numbers should I believe?; what do the panelists agree on?; there is a lack of political will to handle the hard questions; the issue is very complicated and complex; excessive pensions are at expense of rank and file employees; public pensions and retiree health benefits are out of line compared to private/corporate plans; scare tactics shouldn't be used; MCERA should have been part of the panel; explain the composition of the MCERA board; the presentations seemed anti-labor and anti-public sector; there was CSPP literature on the tables – how was that balanced or fair?; event should have been longer; still felt like “us against them”; why all men panelists?

## APPENDIX: EXCERPTS FROM PARTICIPANT EVALUATION FORMS

Fifty-seven worksheets were submitted although not all participants filled out every question on the worksheets.

### *PARTICIPANT FAMILIARITY WITH TOPIC*

Over half the of attendees completing the worksheets described themselves as somewhat familiar or very familiar with components and status of Marin County budget, and 69% said the same on the cost and operations of Marin County public employee pensions.

<b>FAMILIARITY OF SUBJECT</b>	<b>Familiar</b>	<b>In the middle</b>	<b>Not familiar</b>
Main components and status of the Marin County budget	59%	27%	14%
Cost and operations of public employee pensions in Marin County	69%	24%	6%

### *EVALUATION OF MEETING FORMAT AND PROCESS*

Overall, feedback was positive on the format, with 2/3 to almost all saying that the purpose of the meeting was clear, agenda and process were appropriate, had enough information to participate, enough opportunities to express their views and felt the facilitator provided a welcoming environment.

<b>FORMAT</b>	<b>Strongly Agree or Agree</b>	<b>Disagree or Strongly Disagree</b>	<b>No Opinion</b>
The purpose of the meeting was clear to me	95%	5%	0%
The agenda and process of the meeting were appropriate to the topic	79%	18%	3%
I had enough information to participate	95%	5%	0%
There were enough opportunities for me to express my views	68%	33%	0%
The facilitators provided a fair, safe and well-managed environment for participants	66%	20%	15%

### *HELPFULNESS OF THE INFORMATION*

On a scale of 1 (being not helpful at all) to 5 (very helpful), respondents overall felt the forum was helpful in providing basic information, and in particular the panelists' presentations, basic facts PowerPoint, and closing. The table discussions on values and suggestions didn't occur because of shortage of time; instead the discussion was focused on each table asking their most critical question.



HELPFULNESS	Helpful (5,4)	In the Middle/ neutral (3)	Not Helpful (2, 1)
<b>How helpful was tonight's meeting in helping you understand the following:</b>			
Basic facts about Marin County retiree pensions	70%	24%	5%
Different approaches for a sustainable pension program	43%	35%	22%

	Helpful (5,4)	In the Middle/ neutral (3)	Not Helpful (2, 1)
<b>How helpful were the following portions of this evening's forum?</b>			
Basic Facts PowerPoint and Q&A	61%	29%	11%
Panelist presentations and Q&A	81%	14%	5%
Table discussions about values and suggestions* <i>*(discussions about values and suggestions didn't occur; was replaced by discussion of "What does your table believe is the most significant question to ask?")</i>	30%	23%	47%
Closing comments about next steps	55%	30%	15%

**LEVEL OF INFORMATION PRESENTED**

Most also felt the information was at the right level.

Information was too technical	0
Information was somewhat complicated	16%
Information was just about right	70%
Information was somewhat oversimplified	14%
Information was very oversimplified	0

**SAMPLE "INITIAL THOUGHTS/QUESTIONS" AFTER THE BASIC POWERPOINT PRESENTATION**

- Good overview, good summary. *(Multiple responses of this type).*
- The facts were very good. *.(Multiple responses of this type).*
- Fair, impartial
- Informative but incomplete
- Too quick, tried to cover too much.
- Slides hard to read.
- Why did you have an average community member give the presentation instead of an expert?

- Seemed geared to cut versus maintain
- Nothing new; a data dump that accomplished little

SAMPLE COMMENTS TO “WHAT WAS THE MOST IMPORTANT THING YOU LEARNED THIS EVENING? “

- There is a high level of interest in dealing with public pensions.
- There is not a clear statement of the problem.
- Marin citizens care.
- This problem won't be solved anytime soon.
- There is hope.
- That 4% of retirees are eating up 29% of pension benefits.
- The constraint imposed by state laws as to pensions for public employees.
- I liked last year's forum; nothing new this time.
- It's still a muddle but I enjoyed it.

*SAMPLE OF OTHER INFORMATION PARTICIPANTS WOULD LIKE ON THE TOPIC (BASED ON WORKSHEETS AND QUESTIONS SUBMITTED)*

- Distinguish between retiree medical and pensions
- What is the County's unfunded liability
- Describe what the state is doing
- Clarify what can be changed and what can't; what are options
- Explain the composition of the County's pension board, functions and responsibilities
- Provide more information about hybrid plans
- Compare public and private sector compensation
- More information about investment return assumptions

## QUESTIONS SUBMITTED AT THE FORUM

(Staff in process of responding; answers will be posted to the County's pensions website)

### Questions

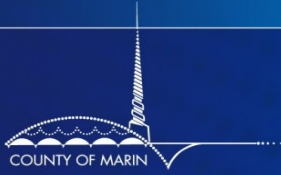
- 1 Could you elaborate on where the unfunded liability resides, if not on the balance sheet? (addressed to Denis Rice)
- 2 When it's said an unfunded liability is \$ 700 million --or \$2.1 billion --over what period of time is it spread out?
- 3 Marin's unfunded liability probably realistically 6 Billion.
- 4 Regarding the Governor's 12 point plan, many say it has no chance of enactment. Have any of the State's 21 unions expressed support for the Plan?
- 5 Of the 12 point in Gov. Brown's proposal, how many (if any) of the points directly impact the State's unfunded liability? (addressed to Richard Gillihan)
- 6 The County pension problem is a part of the States problem. How did the State not prevent this problem 10 years ago? (addressed to Richard Gillihan)
- 7 What do you think the real chances are that the Governor's 12 point plan will get through the legislature?
- 8 Why don't we go back into Social Security?
- 9 Based on CSC decision in Legis. V. Eu, it is correct that retroactive benefit increases, e.g., SB400, are legal, but a retroactive decrease is unconstitutional? (addressed to Gregg Adam)
- 10 Given the State has allowed retroactive pension increased or the purchase of airtime, why is it not equitable to change benefits retroactively, base on changes circumstances, such as poor investment returns and longer retiree life spans?
- 11 Who will directly represent the retirees in the making of final decisions about pension modifications?
- 12 Has anyone asked current retirees, including those with \$ 100K+ pensions, to take a voluntary reduction? Private sector retirees have suffered tremendously with market downturns. Why shouldn't retired public employee share this pain?
- 13 Is it fair that retirees can retire at a young ages with extraordinary pensions and then take on new careers (some even public) and "double dip" until Social Security retirement age? Doesn't "retirement" mean "retirement?"
- 14 As a future recipient of a County pension (Misc. 2% at 55) will my pension be affected if proposed reforms pass? (I'll have 30 years of service in 2014)
- 15 How much greater would Marin's unfunded liability become if the actuarial rate of return is lowered from 7.56 to 6.5%? What about 5.56%? (addressed to Denis Rice)
- 16 How can you possibly expect 7% return when professional money investor/managers only see 4% return? Isn't it better to underestimate rather than over estimate? (addressed to Larry Chu)
- 17 "Why are guaranteed pension benefits not discounted at a guarantee (risk free) rate?" The current system puts taxpayers "on the hook" for any short fall, unfairly.
- 18 What investments are in the pension fund which will yield 7.5%? (addressed to Larry Chu)

- 19 P.B.G.C = no taxpayer bailouts each single er and multiemployee plan pays an annual premium based on plan size (# of participants). Premium is risk-adjusted so plans in poor funded status pay more.
- 20 Why not end COLAs until such time as MCERA is sustainable?
- 21 Are overtime and special allowances like car, education, etc. included in salary computation and why?
- 22 If retirement costs are reduced, how will the public employers react to traditionally lower salaries vs. the private sector?
- 23 Why is the huge overtime cost for fire fighters allowed to continue? (addressed to Gregg Adam)
- 24 New Generation workers will still not have Social Security. Does that not limit their ability to shift to private sector?
- 25 Why should public employees be paid any differently from private workers?
- 26 It seems you have left off over-generous benefits as a cause of increased pension costs. Why?
- 27 How much of the pension funding gap is due to plans that are "safety" plans that cover people who are police, firemen, etc? I.E., what % of the shortfall are law enforcement + fireman as opposed to all other public employees?
- 28 Who are the people who make the investment decisions? Do they have any professionals making recommendations? (addressed to Larry Chu)
- 29 What specific legislation or rule allowed the "retroactive" increase in pension benefits referred to in this presentation and why can't we undo that?
- 30 If municipalities file for bankruptcy, does that allow them to restructure their pension liabilities as it does for private companies? (addressed to Larry Chu)
- 31 What specific pension reforms has Larkspur adopted in the last 2 years? Is Larkspur's pension plan sustainable? (addressed to Larry Chu)
- 32 What changes has Larkspur negotiated since the report was issued? (addressed to Larry Chu)
- 33 How can a hybrid plan not be another source of revenue to the financial sector (i.e., Wall Street)?
- 34 What wrong with making the plan deferred contribution only?
- 35 Won't the hybrid plan make the current pension system even more unsustainable? Where will \$ for future/current liability come from? (addressed to Matthew Hymel)
- 36 Union pensions get a lot of blame but the real problem comes from over the top paid to ?????? Few former managers. How can unions lobby to level the paying field?
- 37 Can you give examples of some egregious top pension payments amounts awarded to certain retired employees?
- 38 About the health benefits --Doesn't Medicare take care of a great percentage of health expenses?
- 39 If the affordable Care Act is sustained what will be the affect on the health benefit?
- 40 Given the Supreme Court's likely rejection of the individual mandate shouldn't Marin and California be working toward single payer lower cost healthcare for the State if not the country to have a not-for-profit lower cost healthcare to reduce gov't employee costs?
- 41 Why are we avoiding the cost of healthcare? Isn't it as big a problem as pensions?
- 42 Pt. 1 --How do you figure the cost of pension benefits?
- 43 Given the high volume of layoffs and unfilled positions --where will the money come from to fund pensions?
- 44 Why do 90% of fire fighters take a disability retirement at or around age 54?

- 45 Has the County considered selling some of its assets to fund the gap (i.e. land)? As soon as Marin residents realize that precious open space is in jeopardy, they will give the Supervisors authority to rationally reduce pension liabilities.
- 46 Why has the Grand Jury ignored back in the 80s when they first sounded the warning? (addressed to Denis Rice)
- 47 Can a Countywide bankruptcy filing trigger restructuring of existing benefits? Has Vallejo's bankruptcy case succeeded in solving its pension problems?
- 48 What is the department doing to counter the messaging war that pensions are not earned benefits --but they are?
- 49 How do the CA rules differ from ERISA rules for private sector? Are State employees required to have pension benefits?
- 50 One should explain in more detail the difference between defined benefits and defined contributions.
- 51 If nothing gets done, no reform, no agreements reached, how would this payout?
- 52 Did the Civic Center have room to accommodate the forum? Why pay extra money to be held at the Osher center?
- 53 Denis Rice mentioned a pension obligation bond being issued in 2003 --Isn't this tantamount to gambling in the stock market on margin? Why is our County engaging in this type of risky behavior?
- 54 Defined contribution plan? Defined benefit plan?
- 55 It seems that we are using more money percent wise, to pay for pension costs than for current employees.
- 56 "Pay as you go" earned benefit plan (pension)..how will the size of the workforce affect the Plan? i.e.: layoffs.
- 57 Is there any reason not to have employees pick up a share of unfunded liability as they do with normal cost? (addressed to Richard Gillihan)
- 58 Why can't the employee contribution be raised to the maximum permissible under CERL?
- 59 Why do we have to "work with unions" to get employees to stop picking up employee portions of contributions? Shouldn't that be one of the first things mandated to end?
- 60 Is "equal sharing (Brown's point #1) currently feasible under CALPERS procedures for towns? (addressed to Richard Gillihan)
- 61 How is it even possible that there is a benefit called a "employer paid employee contribution" that would be like a private employer paying both the employee contribution and a match. That doesn't exist in the real world.
- 62 Fringe Benefit - 2%? Why does the employee pay 2% of employee share? You are penalizing the taxpayer. Why can't the employee simply pay their share?
- 63 Congratulations on just signing a new contract that reduces the EPMC from 2.6 to 2.0% but ...why are taxpayers paying any of the employee contribution?
- 64 Why are there so few young people (e.g., 30 and under) at this meeting, when it is their futures at stake? What is the County doing to communicate with this subset of the public?
- 65 What is the county website to get more information on pensions and tonight's event?



- 66 Why haven't the Marin County Supervisors done what the Supervisors did in San Jose, namely voted to eliminate their own pensions as an example to the public employee unions that they are serious about pension reform?
- 67 So independent actuaries somehow missed the fact that retirees are living longer thereby putting an unexpected drain on the pension system?
- 68 A dozen years ago, pension funds were seen as over funded due to the excellent economy at that time. Isn't it reasonable to assume the numbers will balance once again --one we move out of this recession? (addressed to Richard Gillihan)
- 69 Slide 6: Reasons for Pension Cost Increase --Which of the three reasons is a surprise? Investment losses: did they think the market would no longer suffer setbacks? Benefits incur . Negotiated in 02 & 05 (known). Retiree mortality rates --living longer (known).
- 70 What exactly can the Board of Supervisors do to reform pensions, short of legislative changes in Sacramento?
- 71 What must be done legally (as opposed to politically) to have all of the Gov's 12 points apply to existing employees, not just new employees?
- 72 Are the recommendation in the MCCMD 2011 Toolkit available without changing State law? (addressed to Larry Chu)
- 73 What would good county legislation, if introduced, contain? --3 key elements? (addressed to Denis Rice)



# MARIN COUNTY GOVERNMENT COMMUNITY FORUM ABOUT PENSIONS

April 3, 2012  
Osher Marin Jewish Community Center  
200 North San Pedro Road, San Rafael

## FORUM PURPOSE

Public employee pensions have become an important topic in the recent economic downturn, as the percent of Marin County's government's total budget going toward retirement pension obligations has increased. The Marin County Board of Supervisors took action in December 2011, including endorsing the Governor's proposed pension reform plan. There are different points of view about what action the Board should take next, but there appears to be general agreement about the need to move toward more "sustainable" pensions.

The intent of this educational forum is to a) develop a shared understanding about how Marin County's pension system works and what options county government has to make changes to the system in the context of state law and local labor agreements; and b) hear different perspectives about what types of changes to employee pensions could be made to achieve a "sustainable" pension program for Marin County government. This is an ongoing conversation and we welcome your additional thoughts and questions at [pensions@marincounty.org](mailto:pensions@marincounty.org).

## AGENDA

- |        |  |
|--------|--|
| 6:00pm | Check-in   |
| 6:15pm | Welcome<br>Meeting agenda and guidelines<br>"Pension Basics" Presentation<br>Questions and answers about how Marin County's pension system works   |
| 6:50pm | Panelist presentations: <ul style="list-style-type: none"><li>▪ Richard Gillihan, California Department of Finance</li><li>▪ Denis Rice, former Marin County Supervisor</li><li>▪ Larry Chu, Larkspur City Council</li><li>▪ Phillip Thomas, Marin Association of Public Employees President</li><li>▪ Gregg Adam, Carroll, Burdick, McDonough, LLP</li><li>▪ Matthew Hymel, Marin County Administrator</li></ul> Questions and answers with panelists about different options |
| 8:00pm | Community discussion   |
| 8:40pm | Panelists share final comments<br>Any final questions from audience<br>Next steps and acknowledgements<br>Complete evaluation forms  |
| 9:00pm | Meeting ends; participants turn in worksheets and evaluation forms   |

**Thank you for participating in this community forum!**

## April 3, 2012: Community Forum Participant Worksheet

Table # \_\_\_\_\_ City you live in: \_\_\_\_\_

Thank you for taking the time to share your individual thoughts and questions using this worksheet. Please turn in this sheet at the end of the evening so that we may record and consider this input in addition to your contributions to the group discussion.

Before the forum begins, please share how familiar you feel you are with the following topics:  
(5= very familiar, 4 = somewhat familiar; 3 = in the middle; 2 = not very familiar; 1 = not at all familiar):

- The cost and operations of public employee pensions in Marin County \_\_\_\_\_
- Options being considered to change public employee pension plans \_\_\_\_\_

### Your initial thoughts/questions after the "Basic Facts" PowerPoint presentation

### Your thoughts/questions after the panelists presentation

Possible steps for pension reform	Concerns and considerations

Is there any other information you would like on the topic of achieving a sustainable pension program for Marin County public employees?

### Table Discussion

What factors should be included in defining “sustainable” for Marin County’s public employee pension program?

What factors should be included in defining “equitable”?

What, if any, specific suggestions do you have for the county on this issue?

## April 3, 2012: Post-Forum Evaluation

Please complete this brief evaluation at the end of the community forum so that we can gauge how effective this process was and enhance future community engagement efforts.

### ONE: About the Forum Format

Please show your answers with a checkmark ✓	Strongly Agree	Agree	Disagree	Strongly Disagree	No Opinion
a. The purpose of the meeting was clear to me					
b. The agenda and process of the meeting were appropriate to the topic					
c. I had enough information to participate					
d. There were enough opportunities for me to express my views					
e. The facilitators provided a fair, safe and well-managed environment for participants					

### TWO: About the Information

**Circle one:**

Not at all Helpful                      Very Helpful

- a. How helpful was tonight's meeting in helping you understand the following:
- Basic facts about Marin County retiree pensions 1   2   3   4   5
  - Different approaches for a sustainable pension program 1   2   3   4   5
- b. How helpful were the following portions of this evening's forum:
- "Basic Facts" PPT presentation and question and answer 1   2   3   4   5
  - Panelist presentations and question and answer 1   2   3   4   5
  - Table discussion about values and suggestions 1   2   3   4   5
  - Closing comments about next steps 1   2   3   4   5
- c. What was the most important thing you learned this evening? \_\_\_\_\_

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d. How did you feel about the information that was presented tonight? **(Please select one)**

- The information was too technical and complicated.
- The information was somewhat complicated.
- The information was just about right.
- The information was somewhat oversimplified.
- The information was very oversimplified.

### THREE: About Your Perspective

a. To help us get a better understanding of who attended this evening, please let us know which of the following describe you **(check all that apply)**:

- I am an interested community member
- I am affiliated with a community group interested in sustainable pensions: \_\_\_\_\_
- I am a current employee of Marin County government
- I am a retired County employee participating in MCERA
- I am a public employee in a different jurisdiction
- Other: \_\_\_\_\_

b. These are next steps I plan to take as a result of this evening's forum **(check all that apply)**:

- Visit the County's web page about pensions for more information
- Share what I have learned with others
- Attend another forum if one is offered
- Communicate with County Supervisors to share my views
- Contact local media about this issue
- Other: \_\_\_\_\_

c. Do you have any suggestions for how else to get community input on pension reform? \_\_\_\_\_

\_\_\_\_\_

d. Who else in Marin County needs to know about this issue?

\_\_\_\_\_

\_\_\_\_\_

e. Do you have any other suggestions for how Marin County government communicates with the community?

\_\_\_\_\_

\_\_\_\_\_