

Date: January 4, 2024

To: JLMBC

From: Staff

Subject: **Employee Benefits Trust Fund Staffing Reimbursements First Quarter Fiscal Year 2023-24**

**JLMBC MEMBERS:**

Employee Organizations

**David Sanders, Chairperson**  
**Marleen Fonseca, First Prov. Chairperson**  
Chad Boggio  
Esteban Lizardo  
Lisa Palombi

Management

**Dana Brown, Vice-Chairperson**  
**Tony Royster, Second Prov. Chairperson**  
Matthew Rudnick  
Matthew Szabo  
Holly Wolcott

**RECOMMENDATION**

That the JLMBC approve (a) reimbursements from the Employee Benefits Trust Fund for Personnel Department salary costs of staff providing administrative support of the LAwell Program in the total amount of \$138,707.32, inclusive of the fourth quarter of fiscal year 2023-24; and (b) reimbursements from the Employee Benefits Trust Fund/Wellness sub-account for Personnel Department salary costs of staff providing administrative support of the LIVEwell Wellness Program in the total amount of \$102,905.81, inclusive of the fourth quarter of fiscal year 2023-24.

**DISCUSSION**

**A. Background**

On **January 7, 1997**, the City established an Employee Benefits Trust Fund (Trust Fund) in Los Angeles Administrative Code (LAAC) Division 5 (Finance), Chapter 95. The purpose of the Trust Fund is for the receipt and retention of City and participant contributions for the LAwell Civilian Benefits Program (LAwell Program). Amounts deposited into the Trust Fund may be used to pay premiums to LAwell Program benefits service providers (medical, dental, vision, life, disability, and accidental death and dismemberment insurance), cash-in-lieu benefits, and administrative and operating costs of the LAwell Program (staffing reimbursements, consulting services, participant reimbursements, education and travel expenses, and other administrative expenses) as approved by the JLMBC.

Subsequently, in 2017, a LIVEwell Wellness Program (LIVEwell Program) sub-account was established within the Trust Fund to receive and track LIVEwell Program funding and expenditures. LIVEwell Program funding is provided by the City’s health plan carriers.

**LAwell Program Positions**

At its **September 7, 2006** and **February 7, 2013** meetings, the JLMBC approved funding from the Trust Fund for three Employee Benefits Division (EBD) full-time positions: two Management Analyst II

positions and one Senior Management Analyst I position providing administrative support to the LAwell Program. Effective **June 25, 2017**, the Management Analyst II pay grade was eliminated.

Subsequently on **August 1, 2019**, the JLMBC approved funding from the Trust Fund for one full-time Management Analyst position (for a total of four positions to be reimbursed from the Trust Fund for providing administrative support to the LAwell Program) to expand cost-containment, efficiency, and accountability strategies in benefit service provider administration. The Management Analyst position became vacant in May 2020.

Effective **April 25, 2021**, the Management Analyst positions were reallocated to Benefits Analyst positions and Senior Management Analyst positions were reallocated to Senior Benefits Analyst positions. Accordingly, reimbursement calculations are based on the new Benefits Analyst and Senior Benefits Analyst classifications.

**LIVEwell Program Positions**

At its **March 3, 2016** meeting, the JLMBC approved funding from the Trust Fund/LIVEwell Program sub-account for two full-time positions: one Senior Personnel Analyst I position and one Personnel Analyst II position providing administrative support of the LIVEwell Program. Effective **June 25, 2017**, the Personnel Analyst II pay grade was eliminated.

Effective **April 25, 2021**, the Management Analyst position was reallocated to Benefits Analyst and Senior Management Analyst positions was reallocated to Senior Benefits Analyst. Accordingly, reimbursement calculations are based on the new Benefits Analyst and Senior Benefits Analyst classifications.

**B. Detail of Proposed Staffing Reimbursements**

The calculation for proposed staffing reimbursements identified in this report includes direct costs (actual salary costs incurred by incumbent staff) and indirect costs as calculated using the City Controller Special Rates for Indirect Cost Centers (Special Rates). The Special Rates are established on a fiscal year basis. Unique rates are identified by department categories. The most recently published rate is Special Rates 44, which identifies an indirect cost rate for Personnel Department staffing of 80.18%. The rates are published on a preliminary basis and subject to change. If the rate is subsequently revised, any necessary adjustments will be addressed in a future quarterly reconciliation.

Calculation details are provided in **Attachment A**.

Submitted by: \_\_\_\_\_  
Robyann Jumaos, Management Analyst

Approved by: \_\_\_\_\_  
Paul Makowski, Chief Management Analyst

# ATTACHMENT A

## LAWELL PROGRAM

FY 2023-24 Fourth Quarter: July 1, 2023 to September 30, 2023

Special Rate 44: 80.18%

Quarter	Position Authority	Reimbursement Amount (Direct/Indirect Salary Costs)	Notes
Fourth Quarter (Jul – Sep 2023)	Benefits Analyst	\$37,501.37	
	Benefits Analyst	\$49,117.57	
	Benefits Analyst	--	
	Senior Benefits Analyst I	\$52,088.38	
	<b>Total</b>	<b>\$138,707.32</b>	

## LIVEWELL PROGRAM

FY 2023-24 Fourth Quarter: July 1, 2023 to September 30, 2023

Special Rate 44: 80.18%

Quarter	Position	Reimbursement Amount (Direct/Indirect Salary Costs)	Notes
Fourth Quarter (Jul - Sep 2023)	Benefits Analyst	\$41,735.53	
	Senior Benefits Analyst I	\$61,170.28	
	<b>Total</b>	<b>\$102,905.81</b>	

## STAFFING REIMBURSEMENTS TOTAL

Fiscal Year 2023-24	First Quarter	<b>LAWELL Program</b>	\$138,707.32
Fiscal Year 2023-24	First Quarter	<b>LIVEWELL Program</b>	\$102,905.81

**Grand Total: \$241,613.13**