



San Bernardino County Employees'
Retirement Association

Strategic Communications Plan

2026 - 2028

Table of Contents

Executive Summary 1

Target Audiences 2

Master Narrative & Key Messages 3

Operational Goals & Objectives 7

Conclusion 10

Executive Summary

SBCERA's strategic communications plan is designed to be consistent with the Mission, Values, and Pillars outlined in our Triennial Strategic Plan for Fiscal Years 2026-28, approved by the SBCERA Board of Retirement in June 2025. This plan does the following:

- Establishes the organization's guiding principles for communications;
- Outlines the messaging that will be used in all efforts;
- Details the tools that will be used to deploy the plan; and
- Identifies the metrics that will be used to measure its effectiveness.

This plan is designed as a guide to define, shape, and communicate the organization's mission, vision, and strategic priorities. It is of the highest importance that this be considered during every interaction—from one-on-one meetings with stakeholders, to communicating with members, interactions with the media, email correspondence, and beyond.

Finally, this plan is a living document. As communication tools evolve, metrics shift, and technology continues to progress, it may be necessary to re-evaluate the plan and make updates as needed.



“
PROUDLY SERVING
THOSE WHO SERVE
SAN BERNARDINO
COMMUNITIES.
”

Target Audiences

SBCERA has a number of various stakeholder groups who have different needs, interests and preferred means of communicating. SBCERA may communicate broadly to many of these audiences at once, or tailor its messaging to a specific group—depending on the topic.

Primary Audiences

1. Active Members

- New members
- Mid-Career
 - 1-5 Years
 - 5+ Years (Vested)
 - Eligible to Retire

2. Pre-Retirement/Retiring

3. Deferred

- Reciprocal
- Vested

4. Retirees

5. Beneficiaries

6. Participating Employers

- Elected Officials
- Senior Leadership
- Payroll and HR Staff
- Communications Staff

7. Prospective Members



Additional Audiences

1. Public Officials

2. Member Associations/Other Retirement Systems

3. Related Professionals

4. Media

5. Labor Groups

Internal

1. Board Members

2. Employees

3. Consultants and Vendors

Master Narrative & Key Messages



The combination of a master narrative and key messages provides recommended language to ensure all communication done on behalf of SBCERA is clear, concise, and easy to understand.

Master Narrative

SBCERA is a defined benefit pension plan providing retirement, disability, and death benefits on behalf of approximately 50,000 members and beneficiaries. SBCERA serves 17 employers throughout California and invests more than \$16.3 billion in assets.

Mission Statement

It is the mission of the San Bernardino County Employees' Retirement Association (SBCERA) to provide members and their beneficiaries with those retirement and related benefits and services which they have earned and which are commensurate with their years of service and compensation. It is the responsibility of those charged with the administration of SBCERA to:

- Effectively collect contributions to fund liabilities incurred;
- Diversify the investments of the system so as to minimize the risk of loss and to maximize the rate of return;
- Administer the benefits impartially, fairly, and in accordance with the applicable law;
- Deliver service to the membership in an accurate, courteous, prompt, professional, and cost-efficient manner;
- Appropriately set employer and member contributions in accordance with responsible funding practices; and
- Strategically plan for the future.

SBCERA Values

Integrity – We will be honest, ethical, respectful and trustworthy in all aspects in serving our members, employees, and our community.

Accountability & Transparency – We will ensure that the decisions we make and how we conduct business is clearly communicated and understood. We will be accountable for our conduct in all aspects of our service.

Commitment – We will approach our work enthusiastically.

Effectiveness – We will be results-oriented in a cost-effective manner, capitalizing on our strengths and capabilities.

Professional Excellence – We will be skilled, confident, and capable.

Collaboration – We will work together as a team and with key stakeholders.

With a clearly defined mission and set of shared values, SBCERA is driven to provide service and a focus on the following co-equal pillars:

- Operational Excellence and Efficiency
- Superior Service Experience
- Quality Employer and Workplace
- Prudent Fiscal Management
- Effective Communications

Each of these pillars has a set of Strategic Priorities, which are elaborated in the **Triennial Strategic Plan** located on our website at www.SBCERA.org.

SBCERA has been administering secure retirement benefits since 1945. As SBCERA has grown, so has our responsibility to provide superior service, communications, and administration of retirement benefits.

Key Messages

These messages are designed to support the Triennial Strategic Plan as well as SBCERA's overall mission.

Key Message 1: Superior Service

SBCERA provides a superior service experience for all its members and stakeholders.

- 1.1** SBCERA has a skilled, confident, and capable team committed to serving those who serve San Bernardino communities.
- 1.2** SBCERA provides the highest quality of resources to members through educational opportunities such as retirement seminars, webinars, and online material.
- 1.3** SBCERA approaches its commitment and service enthusiastically.
- 1.4** SBCERA delivers service to membership in an accurate, courteous, prompt, professional and cost-efficient manner.

Key Message 2: Transparency & Accountability

SBCERA is accountable to its members and stakeholders.

- 2.1 SBCERA is committed to conducting business in an open, transparent and impartial way.
- 2.2 SBCERA ensures the decisions we make and how we conduct business are clearly communicated and understood.
- 2.3 SBCERA has a duty to serve both Members and Plan Sponsors. SBCERA strives for continual improvement in our service, and transparent communication.
- 2.4 SBCERA administers benefits impartially, fairly, and in accordance with the applicable law.

Key Message 3: Security

SBCERA is committed to providing a secure retirement.

- 3.1 SBCERA provides retirement security to its members and beneficiaries by paying earned benefits now and in the future.
- 3.2 SBCERA is committed to protecting personal information for our members while keeping all data safe and secure.
- 3.3 SBCERA is committed to modernizing and streamlining technologies in an effort to enhance overall security and efficiencies.

Key Message 4: Prudent Fiscal Management

SBCERA practices prudent fiscal management to build, monitor, and maintain the Plan for today and future generations to come.

- 4.1 SBCERA appropriately sets employer and member contributions in accordance with responsible funding practices.
- 4.2 SBCERA diversifies the investments of the system to minimize the risk of loss and to maximize the rate of return.
- 4.3 SBCERA recognizes the importance of efficiently managing our resources and responsibly funding the Plan over time.

Key Message 5: Leadership

SBCERA is a leader and collaborator in all areas of retirement and pension services.

- 5.1 SBCERA is forward-thinking and pairs advanced technology with leading operational practices that help increase effectiveness and lower costs.
- 5.2 SBCERA leadership participates in responsible legislative advocacy.
- 5.3 SBCERA recruits and hires the most skilled and qualified personnel in their respective fields.
- 5.4 SBCERA strategically plans for the future.

Guiding Principles

Principle 1: Be transparent.

As a public agency, SBCERA operates in an open and transparent manner. These principles should be reflected in all communications efforts and by openly communicating various aspects of the retirement plan.

Principle 2: Be clear.

Words have the potential to inform, encourage, and empower. But the wrong words can leave people uncomfortable, overwhelmed, or confused. Cutting back on jargon and delivering messages to help provide a clear understanding is essential.

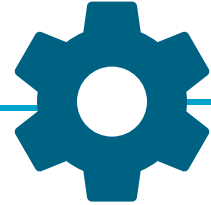
Principle 3: Be on message.

Retirement information is complex and can be confusing. When communication related to the Plan is difficult to understand, the information can become more overwhelming. A set of key messages and a master narrative have been carefully created to help explain the SBCERA's mission and should be used on all fronts of communication efforts, both internally and externally.

Principle 4: Be engaging.

Effective communication is undoubtedly a two-way street. People expect to weigh in with their thoughts and opinions on various topics that are communicated. Communication efforts should encourage audience engagement and work to create a sense of collaboration when it makes sense.

Operational Goals & Objectives



A variety of tactics should be implemented to reach the goals and objectives outlined in this plan. The goals are described in the following categories: collateral development, member outreach, employer outreach, government & legislative affairs, internal communications, and measuring.

Collateral Development: Collateral is any communication tool used to help share SBCERA's message. Examples include, but are not limited to: fact sheets, newsletters, website, videos, photos, PowerPoint presentations, folders, business cards, stationery, brochures, etc.



Video Library: Expand SBCERA's video library to include more quick tip videos based on frequently asked questions and popular topics, instructional videos for members, and EmployerDirect tutorials for participating employers.

Target Completion: Ongoing



We Are SBCERA Campaign: Expand 'We Are SBCERA' campaign video series designed to feature stories about the people who define SBCERA.

Target Completion: Ongoing



Refreshed Printed Handouts: Reimagine and refresh printed handouts by identifying visual enhancement opportunities and removing any jargon.

Target Completion: End of 2026



New Member Welcome Package: Work with Member Services to launch a new member welcome package designed to confirm accurate enrollment information and educate members about SBCERA and their retirement benefits from the start.

Target Completion: End of 2026

Member Outreach: Thoughtful member outreach plays an instrumental part of this plan. The work done in this area is a key ingredient for SBCERA to nurture positive relationships with the members we serve, while providing them with the tools they need.



Member Education and Post-Retirement Support: Deploy targeted campaigns using data-driven insights, expand SBCERA's financial education program, partner with Voya and other defined contribution plan record keepers to improve financial preparedness, offer more workshops for retirees, and track respective metrics surrounding member education.

Target Completion: Ongoing

Stakeholder Relations: Informing, engaging, and educating our government stakeholders, while participating in responsible advocacy are each critical components of this plan. The work done in this area helps SBCERA strengthen positive, collaborative relationships with our employers and other stakeholders alike.



Employer Handbook: Create an Employer Handbook with Fiscal Service Department that will serve as a helpful guide to SBCERA participating employers that will provide an overview of SBCERA benefits, funding for those benefits, and the role of a participating employer.

Target Completion: End of 2026



Employer Education:

Employer Forum: Hold annual Employer Forum event designed to inform, educate, and empower participating employers in their role as it relates to SBCERA.

Target Completion: February 2026, 2027, and 2028

SBCERA University: Create a certification program and curriculum to provide our employers with the tools needed to communicate SBCERA benefits. These will be tailored to our employers' human resource, payroll, finance, and executive staff. Material will be inclusive of priority topics identified in the employer survey.

Target Completion: End of 2026

Employer Library: Expand Employer Resources Library that provides video tutorials, employer handbook, and other resources.

Target Completion: Ongoing



Government Relations & Legislative Affairs: Evaluate SBCERA's government and stakeholder relations efforts with a renewed focus on legislation and policy. Our Government Affairs Manager will lead this effort, while planning, developing, and implementing a proactive government relations and legislative affairs program.

Target Completion: Ongoing



Responsible Advocacy: Using our Legislative Principles & Guidelines, focus on legislation affecting SBCERA administration and/or investments. Engage in advocacy directly and through associations such as SACRS, CALAPRS, and CSDA.

Target Completion: Ongoing

Internal Communications: The goal of internal communications is to inform, inspire, and engage. The purpose is to strengthen trust, improve knowledge sharing, and empower staff, while creating a synergy that refocuses the team on SBCERA's overall mission and goals.



Internal Communications Plan: Create an Internal Communications Plan that ensures intentional, timely, and consistent communication to all staff. This plan will be created in collaboration with the senior leadership team.

Target Completion: End of 2026



Employee Onboarding & Engagement: Partner with Human Resources on a employee onboarding video project designed to help new team members feel informed, confident, and connected as they begin their journey at SBCERA.

Target Completion: End of 2026



Diversity, Equity, and Inclusion: In collaboration with Human Resources, evaluate SBCERA's diversity, equity, and inclusion efforts. Strengthen external and internal communication elements geared towards this goal.

Target Completion: Ongoing

Measuring: It is important to measure perceptions of SBCERA before, during, and after deployment of this communications plan. This will provide important measurable data to determine whether our efforts are having the intended effect.



Member Engagement Survey: Conduct a biannual member engagement survey about customer service, communication, outreach, and overall experience for members, looking at both qualitative and quantitative data.

Target Completion: End of 2027



Employer Engagement Survey: Conduct a survey to determine perceptions regarding employer communication and outreach efforts, looking at both qualitative and quantitative data.

Target Completion: End of 2027



Communications & Engagement Metrics: Regularly track and analyze data such as email performance, website analytics, and social media engagement to refine our strategy. Evaluate survey respective results and modify communications efforts as needed.

Target Completion: Ongoing

Conclusion

Enhancing trust, credibility, and transparency for our members and stakeholders is one of the highest priorities for SBCERA. We are committed to developing and implementing the most effective communication objectives and methods to ensure delivery of consistent, clear, and helpful messaging. The desired outcome of this plan is for our audiences to be well-informed, engaged, and truly understand the information being delivered.