



Triennial Strategic Plan for the Fiscal Years 2026, 2027, and 2028 Update as of January 2026

Strategic Plan is located at <https://www.sbcera.org/strategic-plan>

Strategic Pillar	Ref. No.	Priority	Goals	Status	Executive Sponsors	Target Completion
Operational Excellence & Efficiency	1-1	Enterprise Content Management solution transition to Sharepoint	Improved collaboration tools; transition from shared drives	<u>January 2026</u> : Underlying system architecture and data definitions will be complete by Spring 2026, and then transition can begin.	Michael	June 2027
Operational Excellence & Efficiency	1-2	Unify Board Policies into an Administrative Code	Codify SBCERA Policies into a unified and chaptered Administrative Code, a "one stop shop" for information on SBCERA Board policies	<u>January 2026</u> : Anticipate project commencement by Spring 2026.	Cherney Hannah	December 2026
Operational Excellence & Efficiency	1-3	Standardized employer data transfer platform	Empower employers to certify member data, ensure compliance, and reduce SBCERA processing times, costs, and overall risk	<u>January 2026</u> : The last component for the employer testing "sandbox" is being delivered by LRS Pension Gold, and the employer guide and training is anticipated to be rolled out beginning in January 2026. The testing "sandbox" and training is expected to go throughout 2026, although employers will have the option to go live earlier than December 2026 if they choose to do so. We anticipate that the longest component of the project will be the County, and the entities for which the County processes payroll, as there is likely some EMACS programming to be done.	McInerny	December 2026

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San Bernardino County Employees'
Retirement Association

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Operational Excellence & Efficiency	1-4	Call Center "Smart" knowledge base, leveraging artificial intelligence	As an extension of the prior goals to better document processes and procedures, this context-sensitive help solution would be available to assist members with timely, consistent, and accurate information	<u>January 2026</u> : Staff engaged a consultant to assist with enabling features within Dialpad, SBCERA's telephone system, which are currently being tested.	Cintron Michael	April 2026
Operational Excellence & Efficiency	1-5	Restructured approach to Securities Litigation monitoring, evaluation, and claims	Develop an alternative plan to receive independent advice on securities litigation	<u>January 2026</u> : Staff is currently evaluating alternatives with multiple vendors, and plan to bring potential policy updates to the Board by Spring 2026.	Hannah	June 2026
Superior Service Experience	2-1	Performance metrics and reporting	Improve accountability to membership	<u>January 2026</u> : Staff worked with LRS/Pension Gold to develop a pilot set of metrics using Power BI as a standard reporting tool. Based on this pilot, staff will work in combination with LRS/Pension Gold to expand this tool in various areas throughout 2026. The initial goal is to prepare metrics that will help drive internal resource and process decisions, followed by a roll-up metrics report for the Board and stakeholders.	Cherney Cintron McInerney Hannah Michael Barnier Applegate	December 2026



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Superior Service Experience	2-2	SBCERA University	Create a certification program and curriculum to provide our employers with the tools needed to communicate SBCERA benefits; Focus on employer human resource, payroll, finance, and executive staff	<p><u>January 2026</u>: The initial launch of the program will be in conjunction with Priority No. 1-3: the employer reporting initiative.</p> <p>The 2026 Employer Forum will be held on June 3, 2026, and will incorporate multiple sections for different audiences.</p>	McInerney Applegate	December 2026
Superior Service Experience	2-3	Enhanced member education	Continue to improve information resources available to our members, including written materials, video libraries, and in-person/virtual seminars	<p><u>January 2026</u>: Based on attendee feedback, Staff is currently working to revamp our pre-retirement seminars/webinars, to shorten the length and focus on SBCERA matters only, but still providing tools and resources for Voya, County benefits, RESBC and Social Security. The first seminar of the year is scheduled for early February 2026.</p> <p>Staff is also working on a group consultation video.</p>	Cintron Applegate	June 2026



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Superior Service Experience	2-4	Call Center standardization and quality assurance	Incorporate tools and resources to ensure complete, consistent, and accurate information is provided in a professional manner	<u>January 2026</u> : Staff is currently working on this in conjunction with Priority No. 1-4. Our Member Experience Manager regularly monitors calls and provides timely feedback to the MS team.	Cintron	June 2026
Superior Service Experience	2-5	Standardized retirement consultation process	Incorporate tools and resources to ensure complete, consistent, and accurate information is provided as part of the retirement process	<u>January 2026</u> : Staff is currently working on a set of standards for retirement consultation appointments to ensure that members receive consistent information they need.	Cintron	March 2026
Superior Service Experience	2-6	Integrated financial literacy and retirement preparedness with defined contribution recordkeepers	Explore a strengthened partnership with Voya and other defined contribution plan recordkeepers to improve financial education around retirement	<u>January 2026</u> : Staff has had some initial conversations with Voya regarding the potential to integrate SBCERA information with <i>My Orange Money</i> . The compliance considerations for both SBCERA and Voya make full integration challenging.	Cherney	December 2027



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Superior Service Experience	2-7	Survivor Benefits education and processes	Improve speed to initial payment(s)	<u>January 2026:</u> In January 2026, the new Survivor Benefit workflows will be launched within Pension Gold. This will help SBCERA have better insights into process bottlenecks. The team has already identified areas in which streamlined forms will help us administer benefits on a more timely basis, while balancing with appropriate levels of risk.	Hannah	December 2026
Quality Employer and Workplace	3-1	Employee training	Implement soft skills training across the board; continue to standardize and expand training for all employees, including specialized training by department and/or position	<u>January 2026:</u> Staff has initiated a new training series in conjunction with the Center for Organizational Effectiveness, which also does training for the CALAPRS Management Academy. Training will commence in February/March 2026.	Barnier Cherney	March 2026 (initial launch)
Quality Employer and Workplace	3-2	Employee onboarding	Expand curriculum and experience for employee orientation and onboarding	<u>January 2026:</u> Anticipate project commencement by Spring 2026.	Barnier Applegate	June 2026



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Quality Employer and Workplace	3-3	Investment Officer incentive compensation adjustments	Realign incentive compensation in accordance with the policy principles recommended by the Executive Committee	COMPLETED. Board adopted new structure on July 3, 2025, effective with incentive compensation for FY 2026.	Cherney Pierce	COMPLETE
Quality Employer and Workplace	3-4	Employee engagement survey	Launch a new survey in 2026	<u>January 2026</u> : Anticipated for Summer 2026.	Barnier	September 2026
Quality Employer and Workplace	3-5	Internship program	Partner with Hansen & Bridgett for legal internship training; partner with CSUSB to offer paid internships	<u>January 2026</u> : This project was deferred from the prior Strategic Plan. Anticipate initiating by Summer 2026.	Barnier Hannah	December 2026
Quality Employer and Workplace	3-6	Job description modernization/standardization	Incorporate SBCERA Values across the organization	<u>January 2026</u> : This project is well underway with job descriptions being updated as new postings are made. A good example of the new framework can be found here (highlighting our recruitment for the Associate Investment Officer): https://www.governmentjobs.com/careers/sbcera	Barnier	June 2026
Quality Employer and Workplace	3-7	Modernized employee evaluation process	Tie to core values, as well as strategic pillar and priorities	<u>January 2026</u> : Anticipate project commencement by Fall 2026.	Barnier	June 2027

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Quality Employer and Workplace	3-8	Complete ergonomic transformation for office furnishings	Reduce potential for workplace injury	<u>January 2026</u> : The project to relocate Member Services to the first floor also includes replacement of some office furnishings to include sit-stand computer desks. All office furnishings and modular furniture purchased since 2020 incorporate these features. Staff plans to complete this over several years to spread out costs.	Michael	June 2028
Prudent Fiscal Management	4-1	Cybersecurity	Harden defenses through hardware, software, and employee training	<u>January 2026</u> : Substantial progress has been made with the implementation of Palo Alto Networks' Zero Trust Network Access (ZTNA) and Secure Access Service Edge (SASE). With the Board's approval of new cybersecurity auditors, staff anticipates there will be opportunities to continue to harden SBCERA's defenses.	Michael	June 2027/ Ongoing
Prudent Fiscal Management	4-2	Standardize cybersecurity language in contracts	Ensure consistent standards in applying cybersecurity requirements and limitations	<u>January 2026</u> : Staff is working with the Nossaman team to ensure that we have contemporary standard language in our professional services agreements and other contracts.	Hannah	June 2026
Prudent Fiscal Management	4-3	Sunset "Hospitality Office, Inc."; modernize and integrate building systems	Effective July 1, 2025, transition building management in-house, renegotiate contracts; lean on local vendors	<u>January 2026</u> : The building title has been transferred to SBCERA, and the County Assessor has confirmed that all taxes and penalties have been abated. Staff is working with a consultant to review all existing contracts, and is systematically moving to local, lower cost vendors.	Michael	December 2026

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Strategic Pillar	Ref. No.	Priority	Goals	Status	Executive Sponsors	Target Completion
Effective Communications	5-1	New member welcome/enrollment materials	Design and launch new member welcome package designed to ensure confirmation of accurate enrollment information and educate members about SBCERA and their retirement benefits	<u>January 2026</u> : The package has been fully designed, and is expected to begin being sent by February 2026, once legal has signed off on some of the newest materials.	Applegate Cintron	February 2026
Effective Communications	5-2	Enhance in-house capabilities for printing and mailing	Improve cost-savings, control, accuracy, and timeliness	<u>January 2026</u> : We are actively recruiting for a Document Manager Supervisor. Leases for new copiers/printers are expected to be completed by February 2026. The new machines will be deployed in conjunction with the remodel of the third floor copy space. Once done, much of the printing work we currently outsource will be able to be done in-house.	Cintron Michael	March 2026
Effective Communications	5-3	Proactive personalized member outreach campaigns	Leverage data-drive insights; remove jargon	<u>January 2026</u> : This effort, in conjunction with the Priority No. 5-1 (New Member welcome/enrollment materials), includes a new set of "Retirement 101" materials that focus on plain language and infographics. Targeted campaigns for 2026 will include updating beneficiaries.	Applegate Cintron Hannah	December 2026



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Effective Communications	5-4	Resign key communications, such as the Annual Comprehensive Financial Report (ACFR)	Update look and feel to be consistent with brand standards	<u>January 2026</u> : ACFR/PAFR redesign will be done for the FY 2025-26 materials in Summer/Fall 2026.	Applegate	November 2026
Effective Communications	5-5	Engage in responsible advocacy	Focus on issues affecting SBCERA administration and/or investments; engage in advocacy directly and through associations such as SACRS	<u>January 2026</u> : With 2026 being the second year of the legislative session, staff anticipates some high-profile bills to either advance, be significantly modified, or tabled. This includes the PEPR reform legislation that was placed on suspense in 2025, and legislation to require private equity investments in real property to make use of union labor for construction.	Cherney Applegate Hannah	Ongoing