

Triennial Strategic Plan

Fiscal Years 2026, 2027, and 2028

Board of Retirement, as of July 1, 2025

Marc Bracco, Chair – Elected Member (Safety)
Jean-Rene Basle, Vice Chair – Appointed Member
Matthew Erickson – Elected Member (General)
Louis Fiorino – Elected Member (General)
Michael Kennedy – Appointed Member
Ensen Mason – Auditor-Controller/Treasure/Tax Collector (Ex-Officio Member)
Dawn Rowe – Appointed Member
Dawn Stafford – Elected Member (Retired)
Neal Waner – Appointed Member

Alternate Members:

Harry Hatch – Elected Alternate (Retired) John Johnson – Alternate Ex Officio Member Jared Newcomer – Elected Alternate (Safety)

Proposed: June 5, 2025

Mission Statement

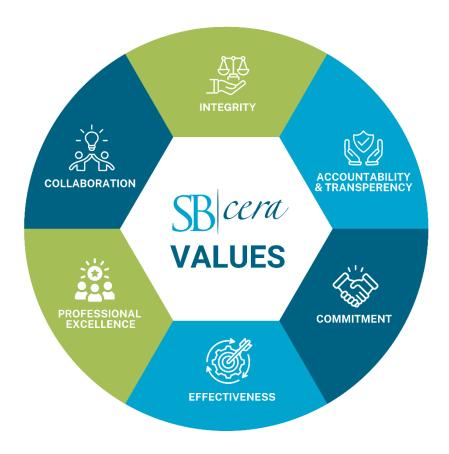
It is the mission of the San Bernardino County Employees' Retirement Association (SBCERA) to provide the members and their beneficiaries with those retirement and related benefits and services which they have earned and which are commensurate with their years of service and compensation.

It is the responsibility of those charged with 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.



Strategic Pillars











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 have a set of Strategic Priorities, which are elaborated below.

Operational Excellence and Efficiency

Strategic Priority	Comments
Enterprise Content Management	Improved collaboration tools; transition
transition to SharePoint	from shared drives.
Unification of Board policies into an	This unified document would house all
SBCERA Administrative Code	Board-approved policies in a single,
	searchable location.
Employer Data Reporting platform and	Empower employers to certify member
standards	data, ensure compliance, and reduce
	SBCERA processing times, costs, and
	overall risk.
Call Center "Smart" Knowledge Base,	As an extension of the prior goals to
leveraging artificial intelligence	better document processes and
	procedures, this context-sensitive help
	solution would be available to assist
	members with timely, consistent, and
	accurate information.
Restructured approach to Securities	Develop an alternate plan to receive
Litigation monitoring, evaluation, and	independent advice on securities
claims	litigation.



Superior Service Experience

Strategic Priority	Comments
Performance metrics and reporting	Improve accountability to membership
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
Enhanced member education	Continue to improve information
	resources available to our members,
	including written materials, video
	libraries, and in-person/virtual seminars.
Call Center standardization and quality	Incorporate tools and resources to
assurance	ensure complete, consistent, and
	accurate information is provided in a
	professional manner.
Standardized retirement consultation	Incorporate tools and resources to
process	ensure complete, consistent, and
	accurate information is provided as part
Later and Conservation Conservation	of the retirement process.
Integrated financial literacy and	Explore a strengthened partnership with
retirement preparedness with defined	Voya and other defined contribution plan
contribution recordkeepers	record keepers to improve financial education around retirement.
	education around retirement.
Survivor Benefits education and	Improve speed to initial payment(s).
processes	

Quality Employer and Workplace

Strategic Priority	Comments
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.
Employee onboarding	Expand curriculum and experience for employee orientation and onboarding



Strategic Priority	Comments
Investment Officer incentive	Realign incentive compensation in
compensation adjustments	accordance with the policy principles
	recommended by the Executive
	Committee.
Employee engagement survey	Launch a new survey in 2026.
Internship program	Partner with Hansen & Bridgett for legal
	internship training; Partner with CSUSB to
	offer paid internships.
Job description	Incorporate SBCERA Values across the
modernization/standardization	organization.
Modernized employee evaluation process	Tie to core values, as well as strategic
	pillar and priorities.
Complete ergonomic transformation for	Reduce potential for workplace injury.
office furnishings	

Prudent Fiscal Management

Strategic Priority	Comments
Cybersecurity	Harden defenses through hardware,
	software, and employee training.
Standardize cybersecurity language in	Ensure consistent standards in applying
contracts	cybersecurity requirements and
	limitations.
Sunset "Hospitality Office, Inc.";	Effective July 1, 2025, transition building
modernize and integrate building	management in-house; renegotiate
systems	contracts; lean on local vendors.

Effective Communications

Strategic Priority	Comments
New member welcome/enrollment	Design and launch a new member
materials	welcome package designed to ensure
	confirmation of accurate enrollment
	information and educate members about
	SBCERA and their retirement benefits.
Enhance in-house capabilities for printing	Improve cost-savings, control, accuracy,
and mailing	and timeliness
Proactive personalized member outreach	Leverage data-driven insights; remove
campaigns	jargon.



Strategic Priority	Comments
Redesign key communications, such as the Annual Comprehensive Financial Report (ACFR)	Update look and feel to be consistent with brand standards.
Engage in responsible advocacy	Focus on issues affecting SBCERA administration and/or investments; Engage in advocacy directly and through associations such as SACRS.

