



San Bernardino County Employees'  
Retirement Association

# 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 transition to SharePoint	Improved collaboration tools; transition from shared drives.
Unification of Board policies into an SBCERA Administrative Code	This unified document would house all Board-approved policies in a single, searchable location.
Employer Data Reporting platform and standards	Empower employers to certify member data, ensure compliance, and reduce SBCERA processing times, costs, and overall risk.
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.
Restructured approach to Securities Litigation monitoring, evaluation, and claims	Develop an alternate plan to receive independent advice on securities litigation.

## Superior Service Experience

Strategic Priority	Comments
Performance metrics and reporting SBCERA University	Improve accountability to membership 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 assurance	Incorporate tools and resources to ensure complete, consistent, and accurate information is provided in a professional manner.
Standardized retirement consultation process	Incorporate tools and resources to ensure complete, consistent, and accurate information is provided as part of the retirement process.
Integrated financial literacy and retirement preparedness with defined contribution recordkeepers	Explore a strengthened partnership with Voya and other defined contribution plan record keepers to improve financial education around retirement.
Survivor Benefits education and processes	Improve speed to initial payment(s).

## 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 compensation adjustments	Realign incentive compensation in 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 modernization/standardization	Incorporate SBCERA Values across the organization.
Modernized employee evaluation process	Tie to core values, as well as strategic pillar and priorities.
Complete ergonomic transformation for office furnishings	Reduce potential for workplace injury.

## Prudent Fiscal Management

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

## Effective Communications

Strategic Priority	Comments
New member welcome/enrollment materials	Design and launch a new member 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 and mailing	Improve cost-savings, control, accuracy, and timeliness
Proactive personalized member outreach campaigns	Leverage data-driven insights; remove jargon.

## Exhibit A: Page 7

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.