



Triennial Strategic Plan for the Fiscal Years 2026, 2027, and 2028
Update as of July 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 | <p><u>January 2026</u>: Underlying system architecture and data definitions will be complete by Spring 2026, and then transition can begin.</p> <p><u>July 2026</u>: Work continues – target date still remains June 2027.</p> | 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 | <p><u>January 2026</u>: Anticipate project commencement by Spring 2026.</p> <p><u>July 2026</u>: Target date for Board review remains December 2026.</p> | Cherney Hannah | December 2026 |

Exhibit A: Page 2



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-------------------------------------|----------|--|--|--|--------------------|--------------------------------|
| 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 | <p><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.</p> <p><u>July 2026</u>: The Employer Reporting Initiative was launched earlier this year, and was featured in the afternoon of the Employer Forum on June 10. The first employer to convert will be Superior Court in the coming months; all others are on track for the February 2027 deadline.</p> | McInerney | December 2026 February 2027 |

Exhibit A: Page 3



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-------------------------------------|----------|--|---|--|--------------------|-------------------|
| 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 | <p><u>January 2026:</u> Staff engaged a consultant to assist with enabling features within Dialpad, SBCERA's telephone system, which are currently being tested.</p> <p><u>July 2026 COMPLETED:</u> The AI Assistant project has been completed and launched for the main call center on May 27, 2026, and the Member Services team is now using this resource to assist with answering member questions. Templates were created to standardize input data for future resource library updates. Moving forward, the team plans to collaborate with other departments to create and expand available resource content. The project will now transition to ongoing maintenance, with updates completed as needed and a full annual review of uploaded documents to ensure information remains accurate, current, and consistent.</p> | Cintron Michael | COMPLETE |

Exhibit A: Page 4



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-------------------------------------|----------|---|--|---|---|-------------------|
| 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 | <p><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.</p> <p><u>July 2026:</u> Under the CEO's authority, Chief Counsel re-negotiated a new contract with FRT which expands the scope of their monitoring and claims services. Under that contract, some claims responsibilities that were done by State Street have been transferred prospectively to FRT. Additional policy changes may be brought to the Board in the coming months, once we have had an opportunity to evaluate how the changes to the program are working.</p> | Hannah | June 2026 |
| Superior Service Experience | 2-1 | Performance metrics and reporting | Improve accountability to membership | <p><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.</p> <p><u>July 2026:</u> The proof of concept with LRS was successful; IS is working on engaging a consultant to help build out Power BI tools. The goals and timing remains as previously noted.</p> | Cherney Cintron McInerny Hannah Michael Barnier Applegate | December 2026 |



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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-----------------------------|----------|-------------------|--|---|------------------------|-------------------|
| 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> <p><u>July 2026:</u> The 2026 Employer Forum was held on June 10 with a full-house of representatives from nearly all of our employers. We will incorporate feedback from that event to further build out the curriculum.</p> | McInerney Applegate | December 2026 |

Exhibit A: Page 6



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-----------------------------|----------|---------------------------|--|--|--------------------|---|
| 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> <p><u>July 2026</u>: The revamped Pre-Retirement Seminars have been well-received by participants, and the shortened length appears to be working well. The team has also updated the retirement checklist and Retirement 101 documents, which provide helpful information and resources for members. In addition, new member welcome packets began being distributed in March 2026. The group consultation video is nearly complete and is expected to launch shortly.</p> | Cintron Applegate | <p>June 2026 July 2026</p> |



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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-----------------------------|----------|---|---|--|--------------------|-------------------|
| 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 | <p><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.</p> <p><u>July 2026:</u> The Member Experience Manager continues to conduct quality assurance reviews of randomly selected phone calls and provide feedback to support consistent, accurate, and professional member service. Internal scripts have been updated for standard member requests, and additional training has been provided to the team regarding call center etiquette and service expectations. This work is further supported by the launch of the AI Assistant in Dialpad, which provides improved access to standardized information and resources when assisting members. Together, these efforts support continued call center standardization, quality assurance, and service consistency.</p> | Cintron | COMPLETE |

Exhibit A: Page 8



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|-----------------------------|----------|---|---|---|--------------------|---------------------------|
| 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 | <p><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.</p> <p><u>July 2026:</u> The standardized base for retirement consultations was used in the development of the group consultation video. The retirement checklist has also been updated to include the key items covered in the video and will be reviewed with members at the end of each service retirement consultation. Members will sign the final page of the checklist to confirm the topics were covered and that they understand the information provided. The final step is to re-train all Retirement Specialists on the updated expectations and new consultation format, and to monitor consultations to ensure the process is being followed consistently.</p> | Cintron | March 2026 August 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 | <p><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.</p> <p><u>July 2026:</u> No new updates.</p> | Cherney | December 2027 |

Exhibit A: Page 9



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|--------------------------------|----------|---|--|--|--------------------|-----------------------------|
| Superior Service Experience | 2-7 | Survivor Benefits education and processes | Improve speed to initial payment(s) | <p><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.</p> <p><u>July 2026:</u> New forms and the policy to address situations in which there was no named beneficiary, or the named beneficiary is no longer alive, have been in place and are working very well. The team continues to successfully work on reducing the backlog.</p> | 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 | <p><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.</p> <p><u>July 2026:</u> The series launched in March 2026 with DISC assessments for all employees and a half-day collaborative training. We will follow up the initial training with three additional trainings developed based on feedback from staff.</p> | Barnier Cherney | March 2026 (initial launch) |

Exhibit A: Page 10



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|--------------------------------|----------|---|--|--|----------------------|---|
| Quality Employer and Workplace | 3-2 | Employee onboarding | Expand curriculum and experience for employee orientation and onboarding | <p><u>January 2026</u>: Anticipate project commencement by Spring 2026.</p> <p><u>July 2026</u>: Project is underway; HR is incorporating DISC assessments for new hires starting later this year.</p> | Barnier Applegate | <p>June 2026 December 2026</p> |
| 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 | <p>COMPLETED. Board adopted new structure on July 3, 2025, effective with incentive compensation for FY 2026.</p> <p>Update: The framework was revised in June 2026 to incorporate the Deputy CIO and provide guidance for how to calculate incentive compensation if there is a mid-year promotion.</p> | Cherney Pierce | COMPLETE |
| Quality Employer and Workplace | 3-4 | Employee engagement survey | Launch a new survey in 2026 | <p><u>January 2026</u>: Anticipated for Summer 2026.</p> <p><u>July 2026</u>: A discussion item will go to the Executive Committee in July 2026 regarding staff surveys.</p> | 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 | <p><u>January 2026</u>: This project was deferred from the prior Strategic Plan. Anticipate initiating by Summer 2026.</p> <p><u>July 2026</u>: With the retirement of Judy Boyette from Hansen Bridgett, the legal internship training has been put on hold. HR is working on a framework for internships, and there are some procedural roadblocks to address (i.e. we do not have part-time positions).</p> | Barnier Hannah | December 2026 |

Exhibit A: Page 11



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|--------------------------------|----------|--|--|--|--------------------|-------------------|
| Quality Employer and Workplace | 3-6 | Job description modernization/standardization | Incorporate SBCERA Values across the organization | <p><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</p> <p><u>July 2026</u>: This project is nearing completion.</p> | Barnier | June 2026 |
| Quality Employer and Workplace | 3-7 | Modernized employee evaluation process | Tie to core values, as well as strategic pillar and priorities | <p><u>January 2026</u>: Anticipate project commencement by Fall 2026.</p> <p><u>July 2026</u>: No new updates.</p> | Barnier | June 2027 |
| Quality Employer and Workplace | 3-8 | Complete ergonomic transformation for office furnishings | Reduce potential for workplace injury | <p><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.</p> <p><u>July 2026</u>: The Member Services relocation was completed in June 2026; the plan remains to complete the remaining ergonomic conversions over the next several years as budget is available.</p> | Michael | June 2028 |

Exhibit A: Page 12



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|---------------------------|----------|---|---|---|--------------------|-----------------------|
| Prudent Fiscal Management | 4-1 | Cybersecurity | Harden defenses through hardware, software, and employee training | <p><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.</p> <p><u>July 2026</u>: The Board will consider an item on its July 3, 2026 agenda to expand its Palo Alto implementation; the item was recommended by the Administrative Committee on a 4-0 vote.</p> | Michael | June 2027/ Ongoing |
| Prudent Fiscal Management | 4-2 | Standardize cybersecurity language in contracts | Ensure consistent standards in applying cybersecurity requirements and limitations | <p><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.</p> <p><u>July 2026</u>: COMPLETE</p> | Hannah | COMPLETE |
| 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 | <p><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.</p> <p><u>July 2026</u>: COMPLETE</p> | Michael | COMPLETE |



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

| 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 | <p><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.</p> <p><u>July 2026:</u> COMPLETE</p> | Applegate Cintron | COMPLETE |
| Effective Communications | 5-2 | Enhance in-house capabilities for printing and mailing | Improve cost-savings, control, accuracy, and timeliness | <p><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.</p> <p><u>July 2026:</u> COMPLETE</p> | Cintron Michael | COMPLETE |

Exhibit A: Page 14



San Bernardino County Employees'
Retirement Association

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

| Strategic Pillar | Ref. No. | Priority | Goals | Status | Executive Sponsors | Target Completion |
|--------------------------|----------|---|--|--|--------------------------------|-------------------|
| Effective Communications | 5-3 | Proactive personalized member outreach campaigns | Leverage data-drive insights; remove jargon | <p><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.</p> <p><u>July 2026:</u> No new update.</p> | Applegate Cintron Hannah | December 2026 |
| 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 | <p><u>January 2026:</u> ACFR/PAFR redesign will be done for the FY 2025-26 materials in Summer/Fall 2026.</p> <p><u>July 2026:</u> In progress.</p> | 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 | <p><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 PEPRA 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.</p> <p><u>July 2026:</u> AB 1383 (PEPRA reform) has a hearing in the Senate Public Employment committee on June 23, 2026. The bill on private equity investments has been placed on suspense and will not be moving forward at this time.</p> | Cherney Applegate Hannah | Ongoing |