



2024 Member Engagement Survey

Superior Service Experience is one of our key pillars as part of our Triennial Strategic Plan.

Our **Member Engagement Survey** is one of the strategic priorities of this pillar.

Our 2024 member engagement survey was a follow up to our 2021 member engagement survey and will continue to drive our member experience efforts.

Our team has been able to implement actionable feedback collected in the 2021 survey, and **we've identified more ways we can best serve our members from the data collected in this survey.**

Trust & Credibility

86% trust SBCERA to administer their retirement benefits.

87% approve of the job SBCERA is doing and among those who approve, 69% strongly approve.

79% are confident SBCERA benefits are safe.

Trust and credibility scores are up across all categories.

“I have no concerns. I have always believed SBCERA is a well-managed fund, and the money will most assuredly be available to me throughout my lifetime.”

“I retired in 2010. SBCERA has done a wonderful job managing the retirement funds, even through challenging times. I have total peace of mind about the safety of my retirement account. I greatly appreciate the impressive job that SBCERA has done in the past and continues to do in the future.”

Member Experience

76% agree that SBCERA provides good customer service.

88% are satisfied with their most recent contact with SBCERA.

69% would use the SBCERA website if they had a question about retirement benefits.

Member experience scores are up across all categories.

Online Self-Service Options in mySBCERA

60%

Have used their mySBCERA online member portal in the last year.

89%

Found mySBCERA easy to navigate and user-friendly.

92%

Found the process of completing their online request easy.

91%

Found it easy to navigate through the online form.

92%

Were satisfied with their experience in completing an online request.

71%

Of members are enrolled in mySBCERA. This is record-breaking for SBCERA.

Communication & Engagement

89% say the website was easy to navigate and user friendly.

80% read communications from SBCERA often or very often.

86% think communication from SBCERA is just about right in length.

Communication and engagement scores are up across all categories.

Future Goals & Objectives

- 1. Increased Performance Metrics & Reporting**
- 2. Call Center Standardization and Enhanced Quality Assurance**
- 3. Elevated Staff Training and Resources**
- 4. Increased Targeted & Customized Communication to Members**
- 5. Expanded Member Education Focused on Financial Education & Preparedness**

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