

# San Bernardino County Employees' Retirement Association 2026 Membership Survey Results Presentation

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March 2026



**Opinion Research on  
Elections and Public Policy**



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# SBCERA – 2026 Membership Survey

## Survey Methodology\*

	Survey Details
<b>Mode</b>	Online (email and text to web) Phone (landline and mobile)
<b>Language</b>	English and Spanish
<b>Length</b>	10 minutes
<b>Target Respondents</b>	SBCERA members
<b>Survey Fielding</b>	February 2 – March 3, 2026
<b>Survey Participants</b>	2,065

### Sample

The sample was developed from a membership file provided by the San Bernardino County Employees' Retirement Association comprising contact information for its members.

### Data Collection Explained

Interviews were conducted using online and telephone survey methods. Participants were invited by email and text message to access the survey by computer, tablet, or smartphone (99%). Live interviewers also called a random sample of participants to complete the survey by phone (<1%).

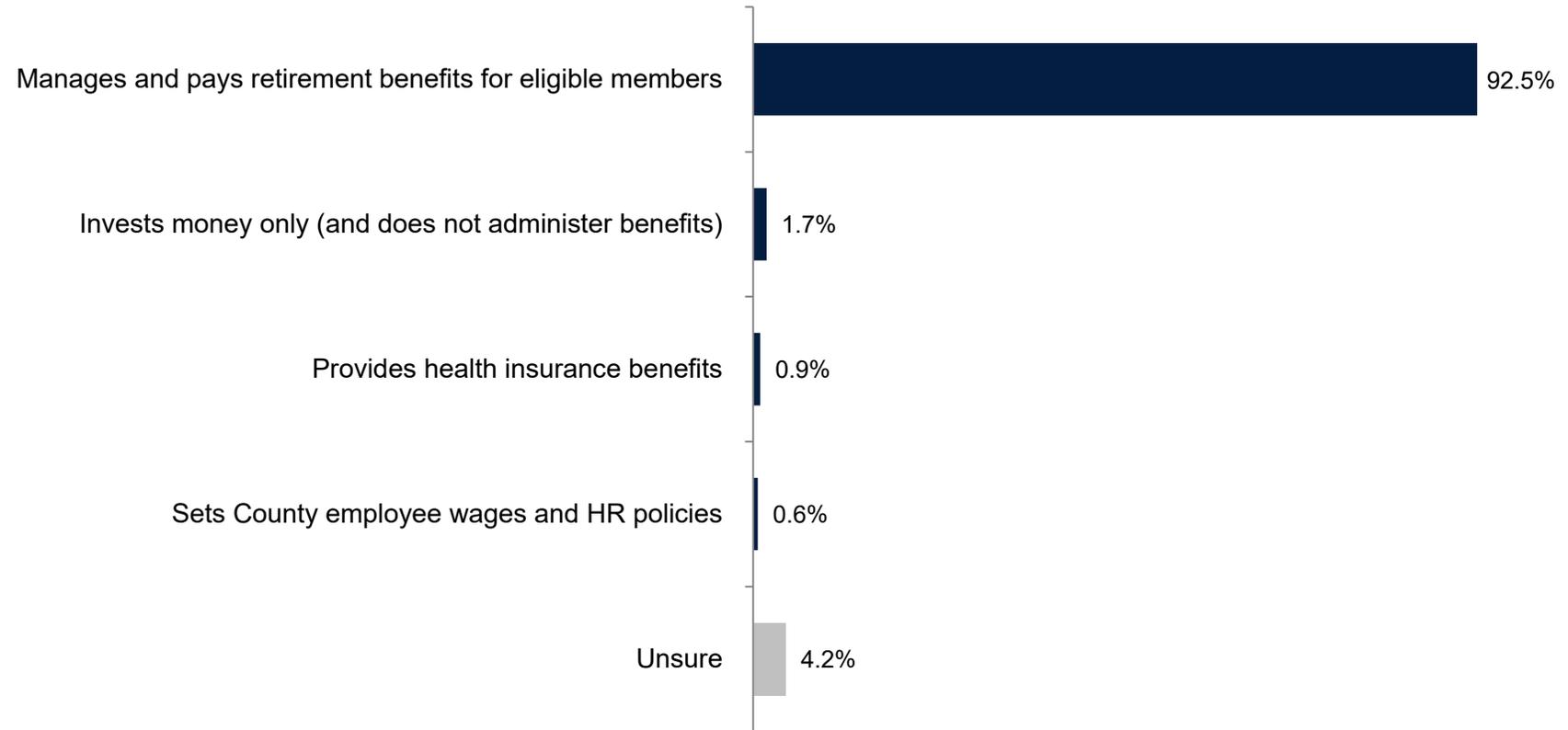
Respondents in all modes chose their preferred language, English (99%) and Spanish (<1%).

Security measures precluded individuals from completing the survey more than once.



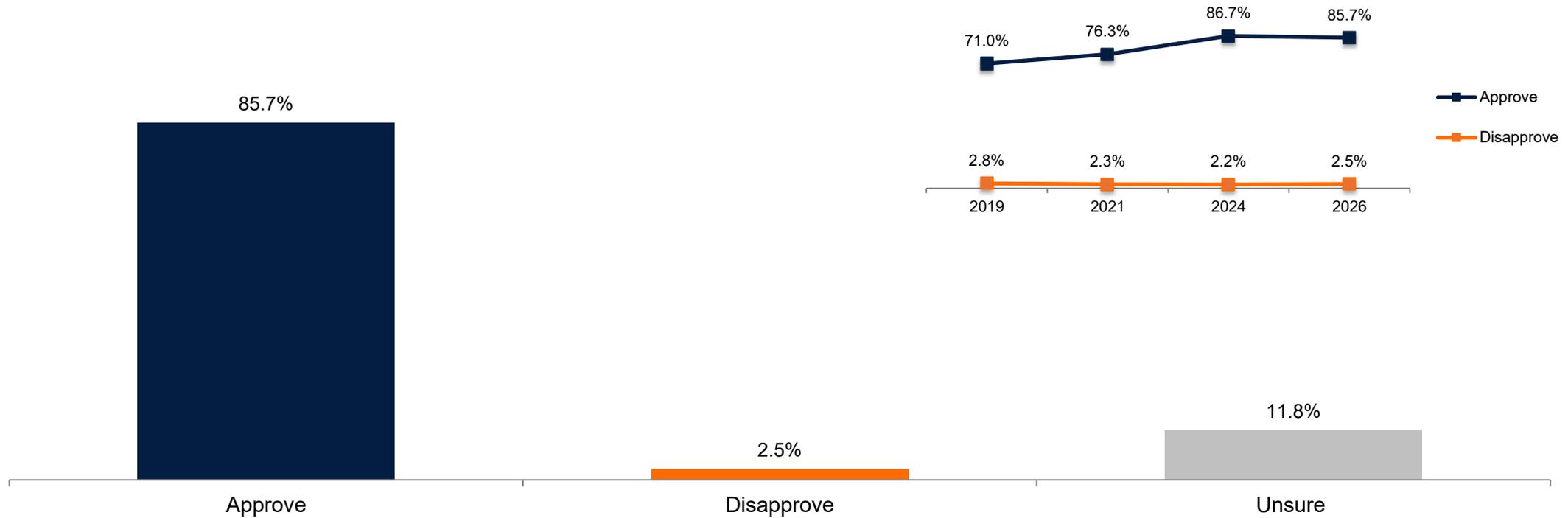
# 93% can accurately describe what SBCERA does

Question 1: Which statement best describes what you think San Bernardino County Employees' Retirement Association (SBCERA) does?



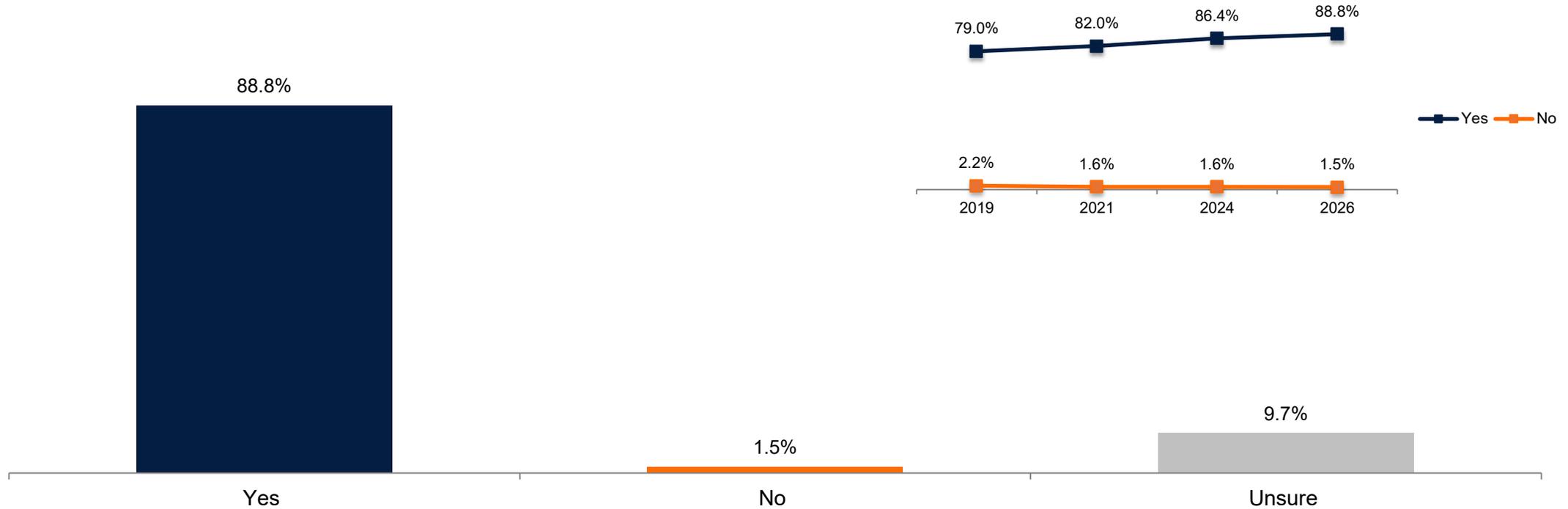
# 86% approve of the job SBCERA is doing

Question 2: San Bernardino County Employees' Retirement Association (SBCERA) is an independently operated, multi-employer defined benefit pension plan providing retirement, disability retirement, and death benefits for over 52,000 members and beneficiaries. SBCERA has a nine-member board with three alternates that provides direction to a professional management team. Do you approve or disapprove of the job that SBCERA is doing?



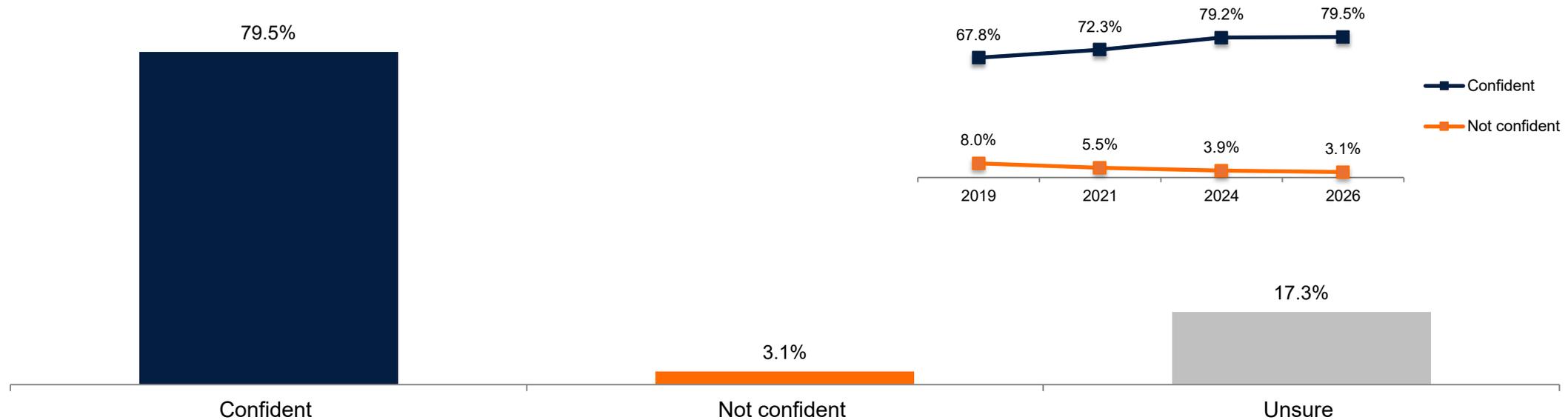
# 89% trust SBCERA to administer their retirement benefits

Question 4: Do you trust SBCERA to administer your retirement benefits?



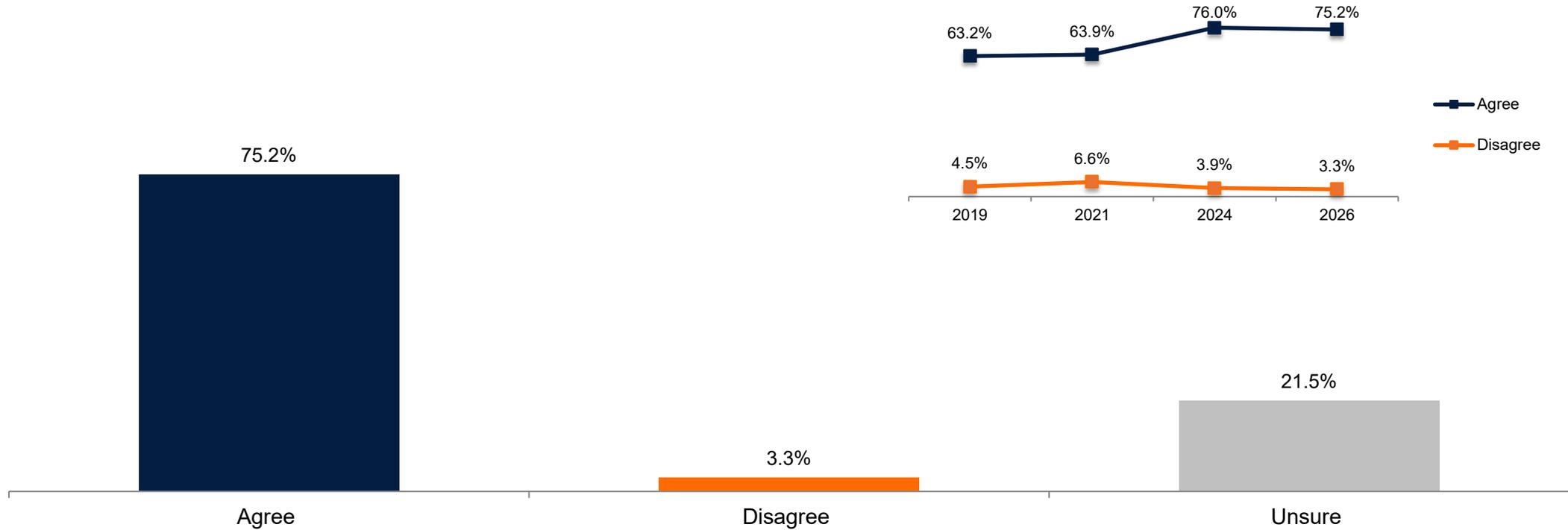
# 80% are confident that their SBCERA benefits are safe and will be there for them in retirement

Question 6: Are you confident that your SBCERA benefits are safe and will be there for you when you retire/for the remainder of your retirement?



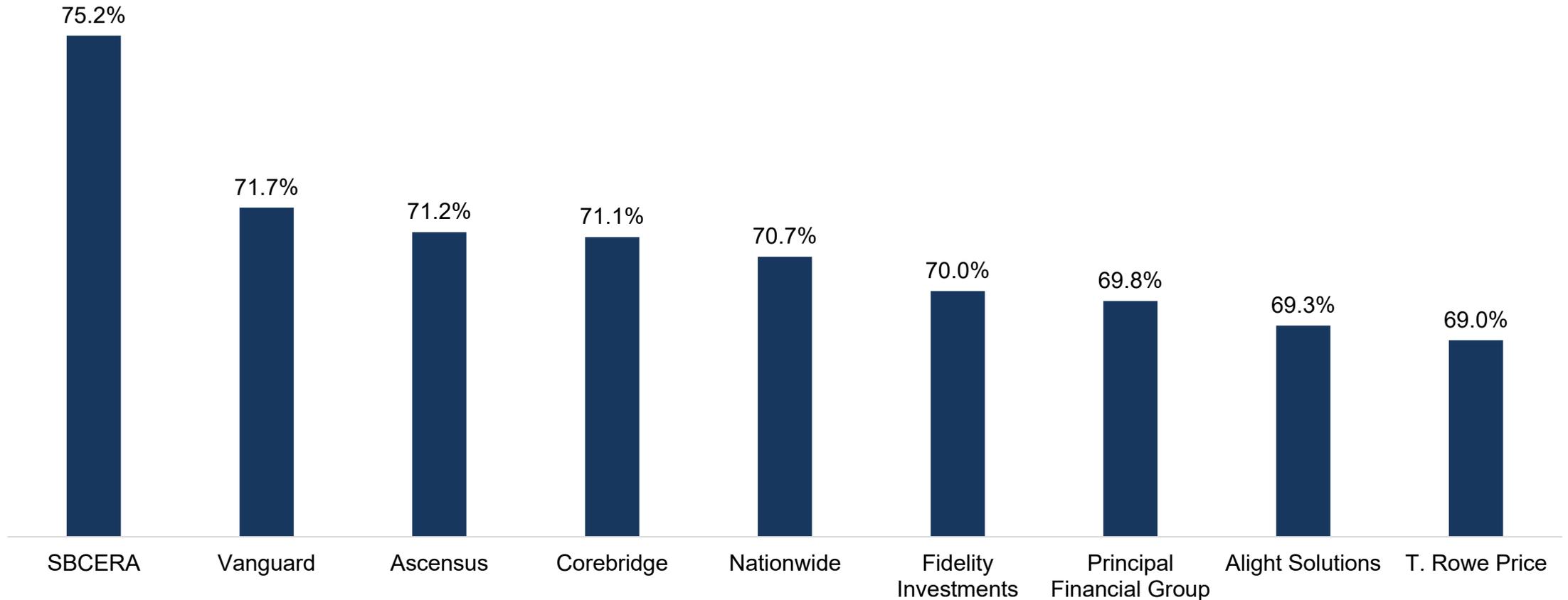
# 75% agree SBCERA provides good customer service

Question 8: Agree or disagree: SBCERA provides good customer service.



# SBCERA ranks high among other national retirement service providers

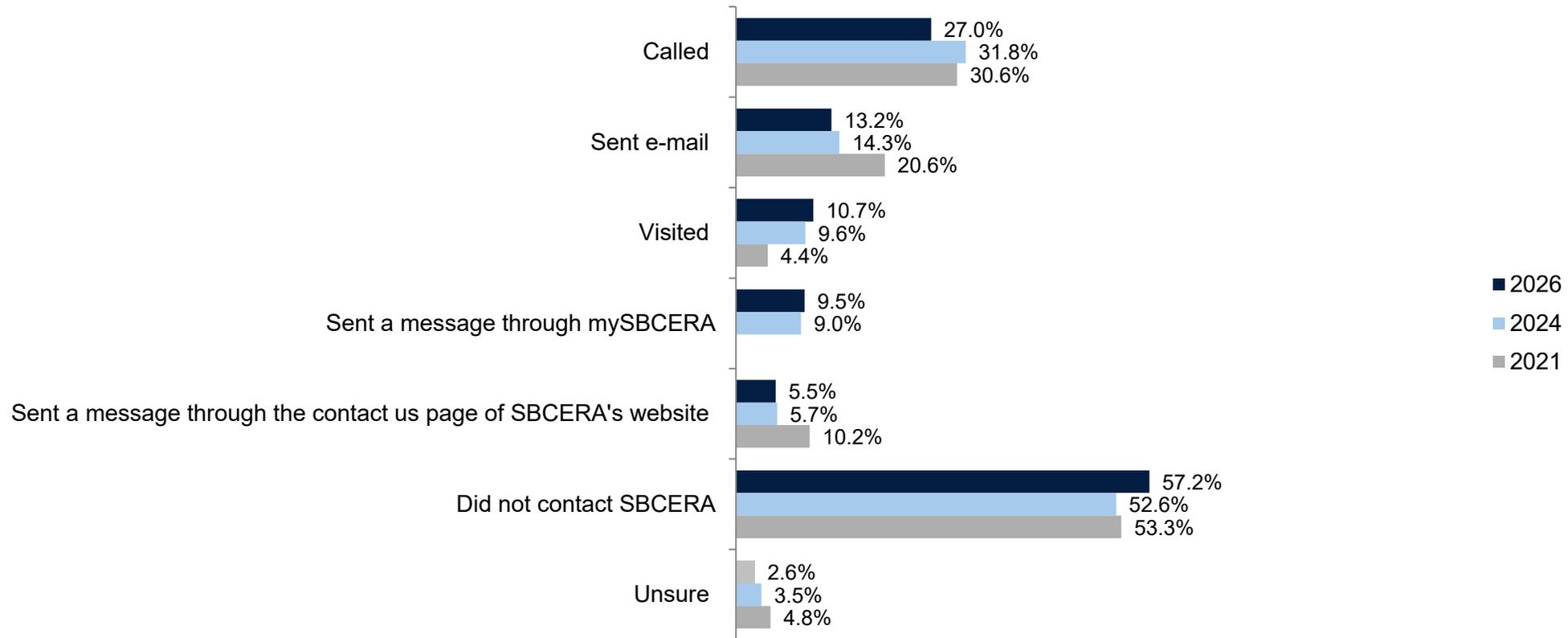
Question 20: Agree or disagree: SBCERA provides good customer service.



\*Data from Probolsky Research and jdpower.com 2025 U.S. Retirement Plan Digital Experience Study

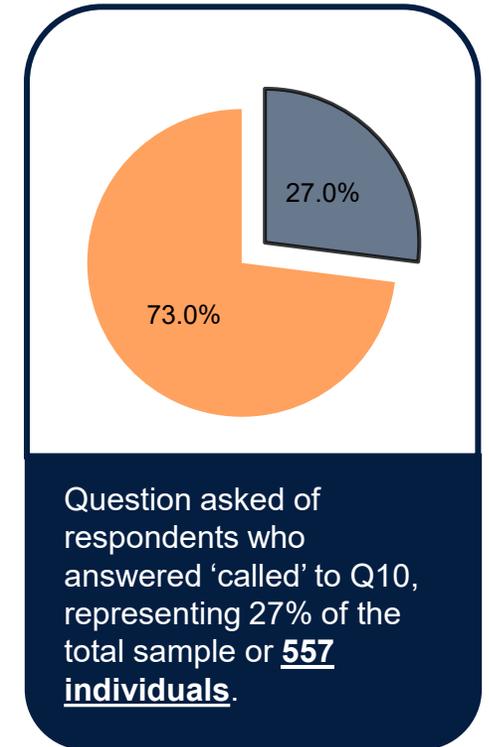
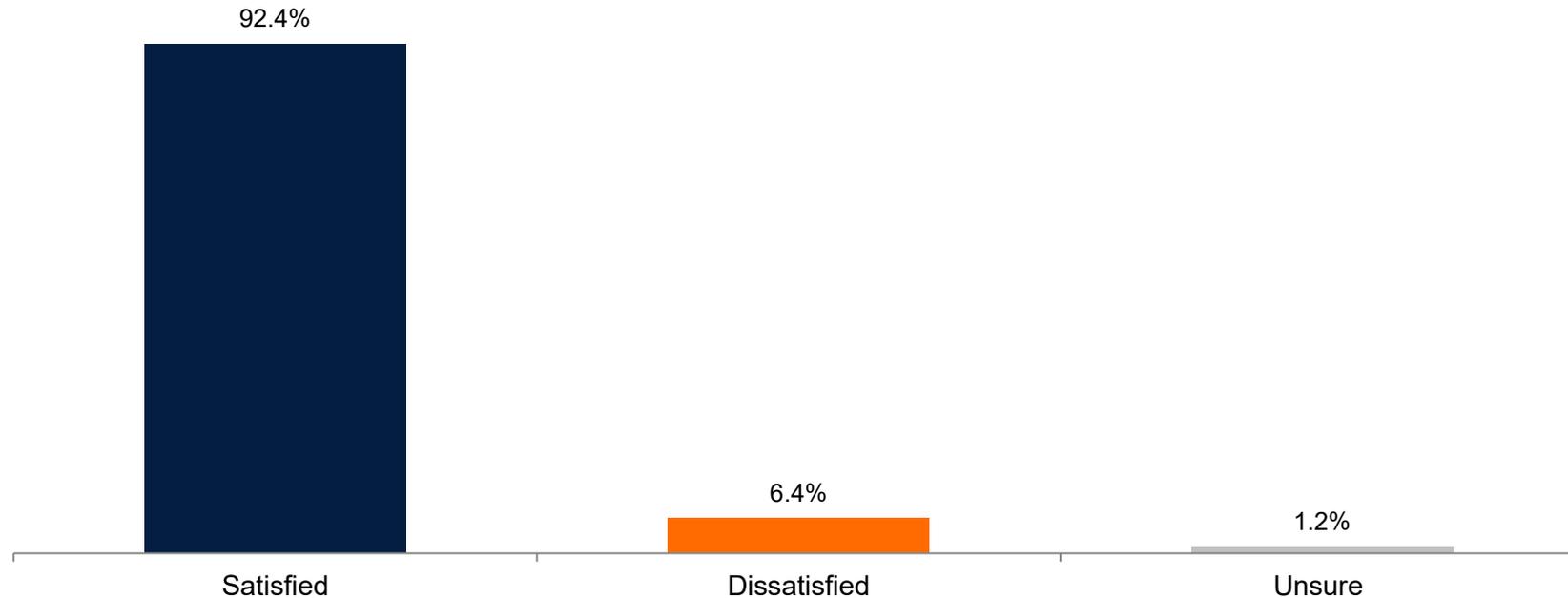
# Calling was the most popular method of contacting SBCERA in the past year

Question 10: Over the past year, by which of the following methods, if any, have you contacted SBCERA? Select all that apply.



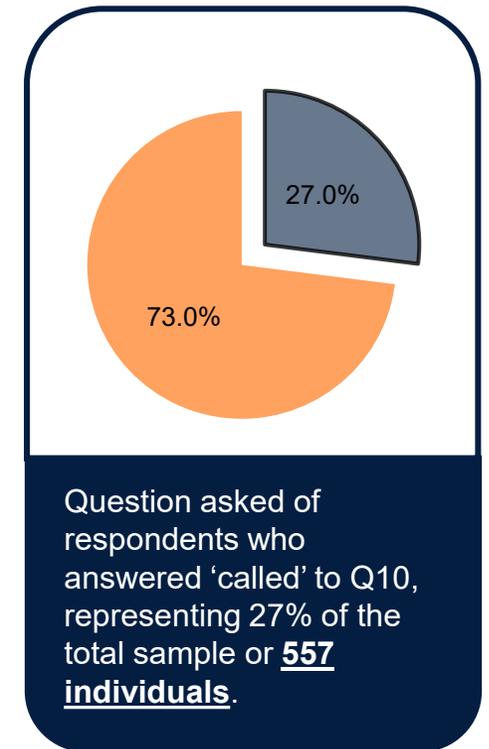
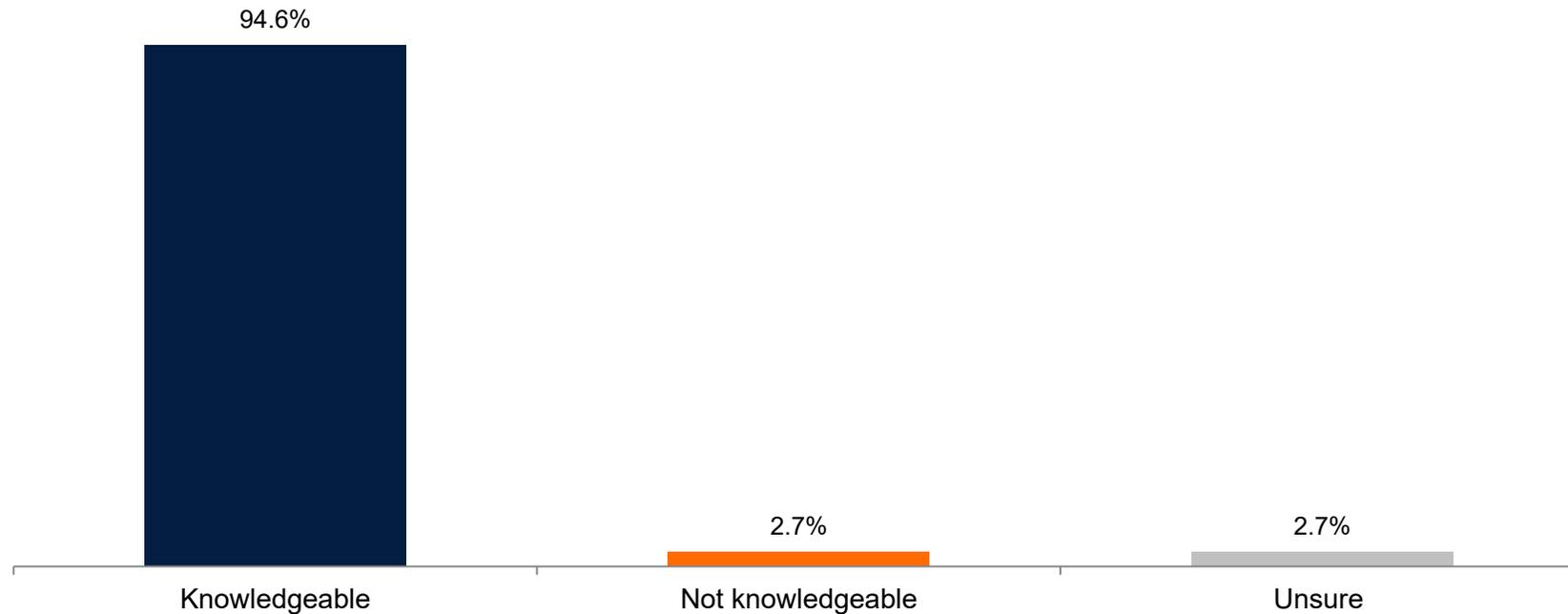
# 92% were satisfied with the time it took to speak to a representative

Question 11: How satisfied were you with the time it took to speak to a representative?  
[IF ANSWERED 'CALLED' TO Q10]



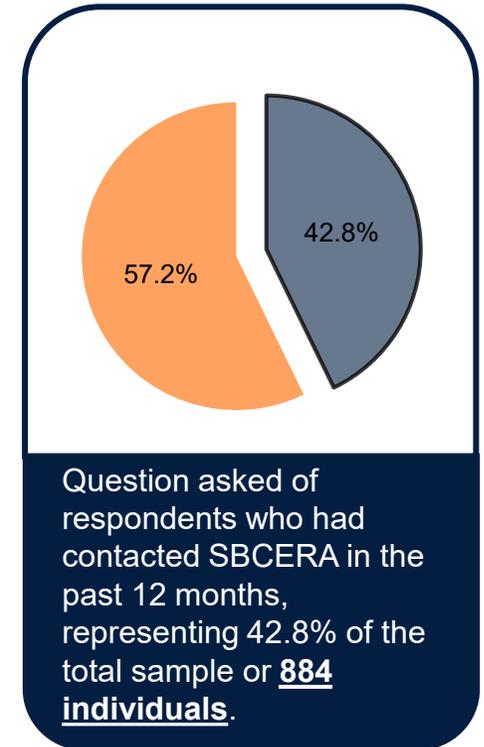
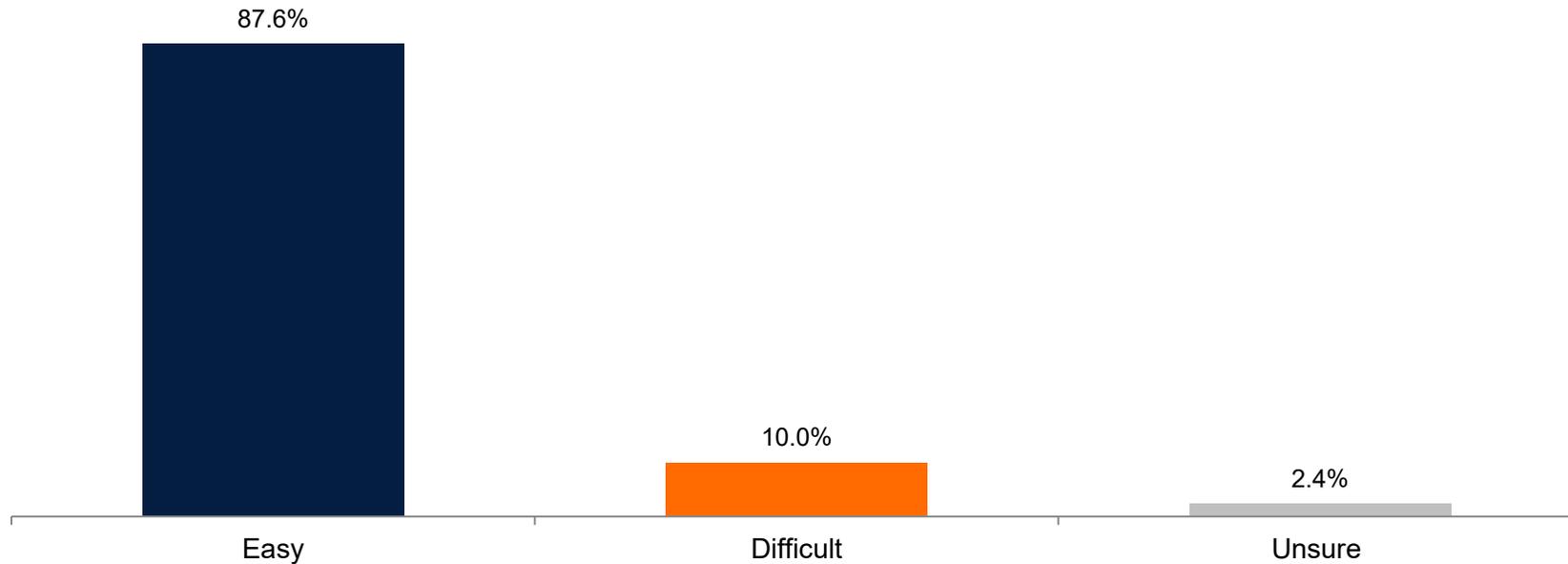
# 95% say the SBCERA representative they spoke with was knowledgeable

Question 12: How knowledgeable was the SBCERA representative you spoke with?  
[IF ANSWERED 'CALLED' TO Q10]



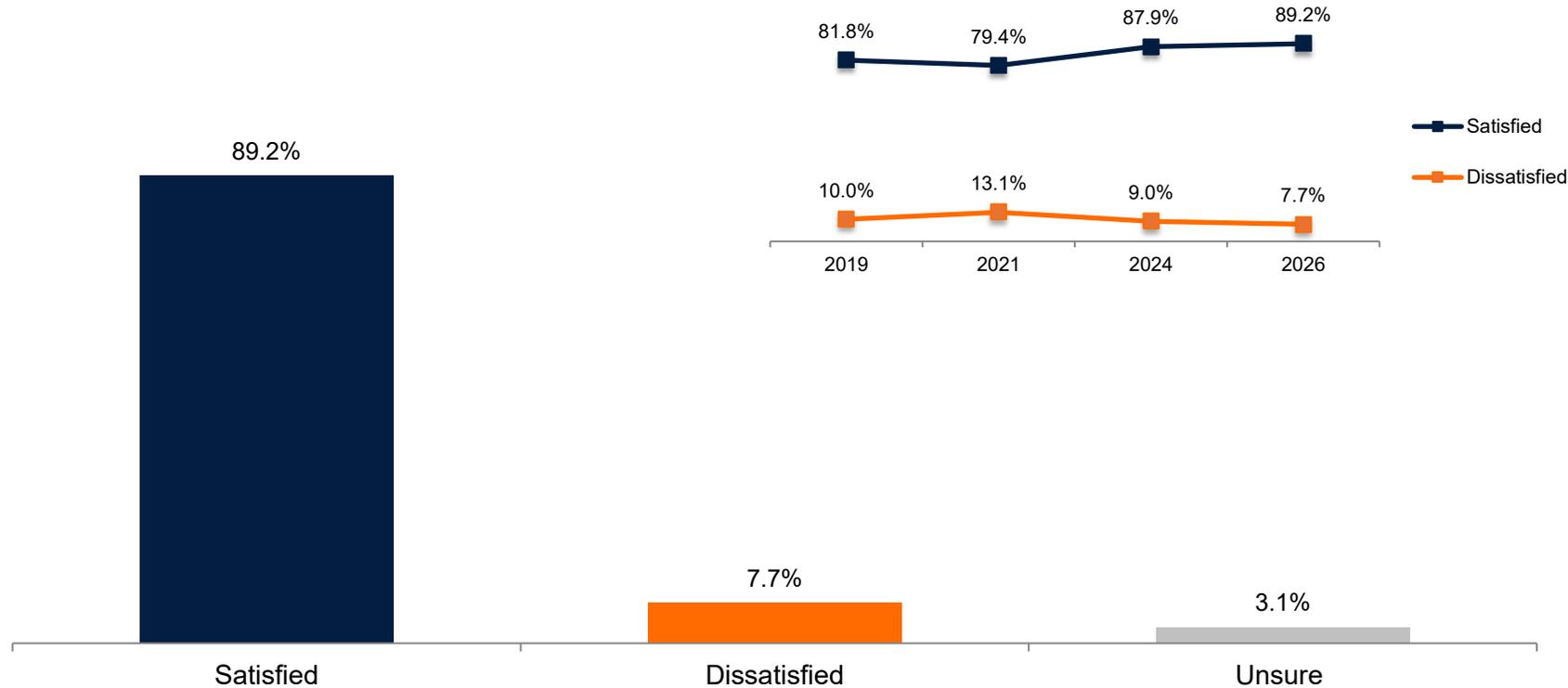
# 88% say it was easy for them to accomplish what they needed in their contact with SBCERA

Question 13: How easy was it for you to accomplish what you needed on your recent contact with SBCERA?  
[AMONG THOSE WHO HAD CONTACTED SBCERA IN THE PAST 12 MONTHS]



# 89% were satisfied with their most recent contact with SBCERA

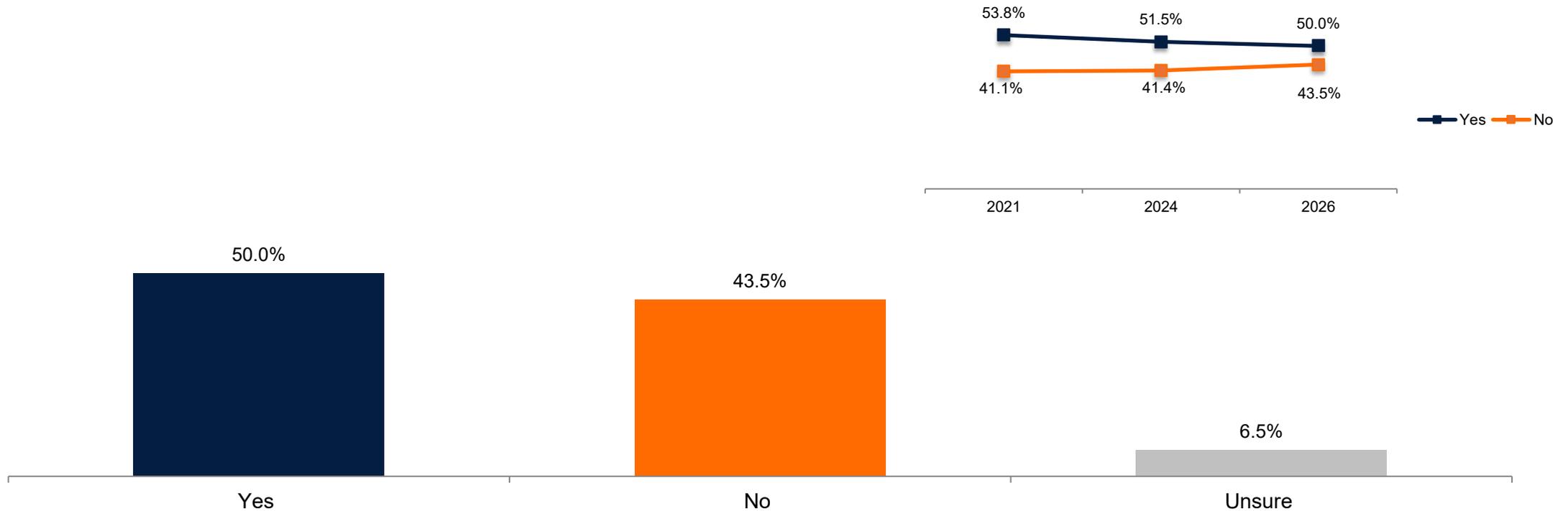
Question 14: Thinking about your most recent contact with SBCERA, were you satisfied or dissatisfied?  
[IF ANSWERED CALLED, VISITED, SENT E-MAIL, OR SENT MESSAGE TO Q10]



Question asked of respondents who answered called, visited, sent email or sent message to Q10 representing 42.8% of the total sample or **884 individuals**.

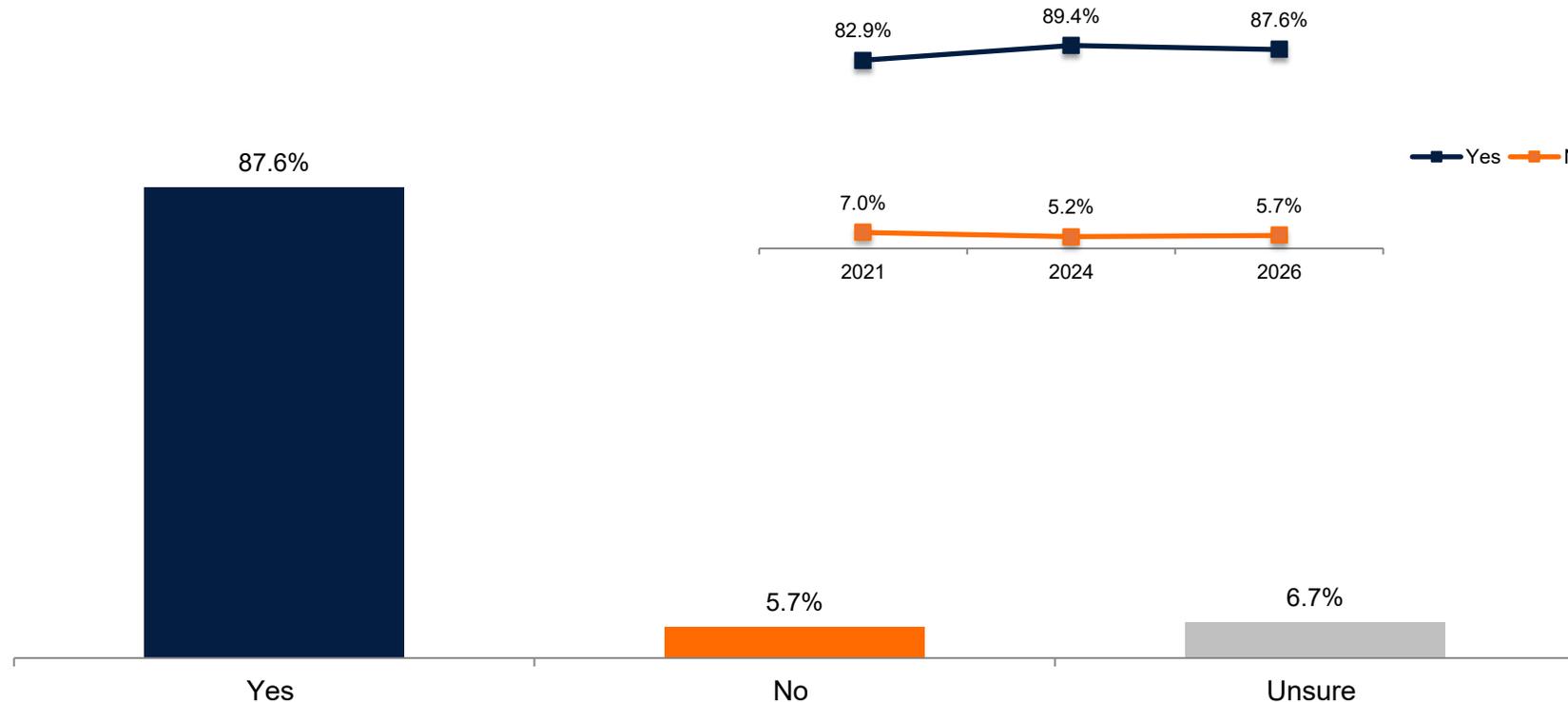
# 50% used the SBCERA website in the last year

Question 16: Have you used the SBCERA website in the last year? Note: This is the main SBCERA website, not the online member portal.



# 88% say SBCERA's website is easy to navigate and user friendly

Question 17: Was SBCERA's website easy to navigate and user friendly?  
[IF ANSWERED 'YES' TO Q16]

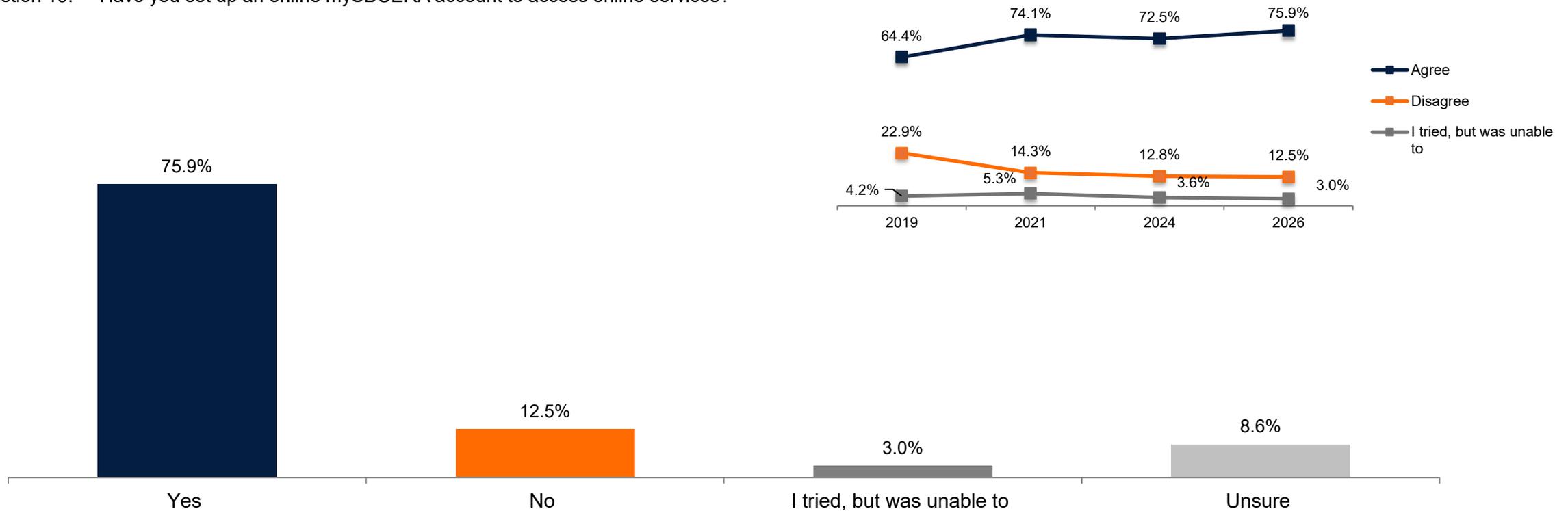


A pie chart showing the distribution of responses for those who answered 'Yes' to Q16. The chart is divided into three segments: 50.0% (dark blue), 43.5% (orange), and 6.5% (grey).

Question asked of respondents who answered yes to Q16 representing 50% of the total sample or **1033 individuals**.

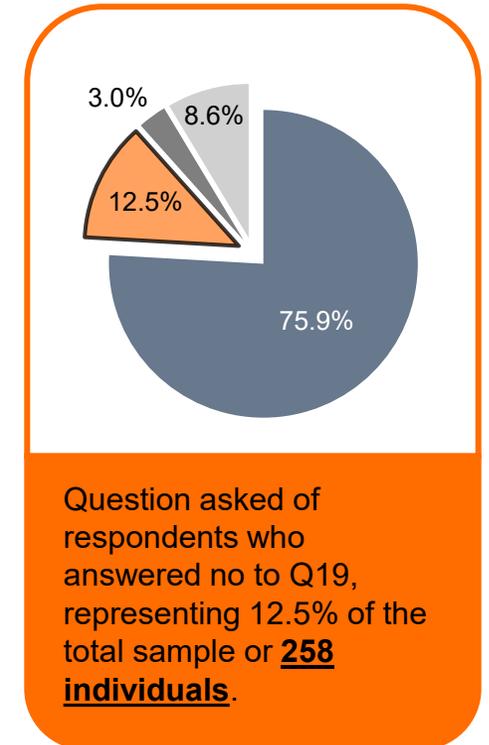
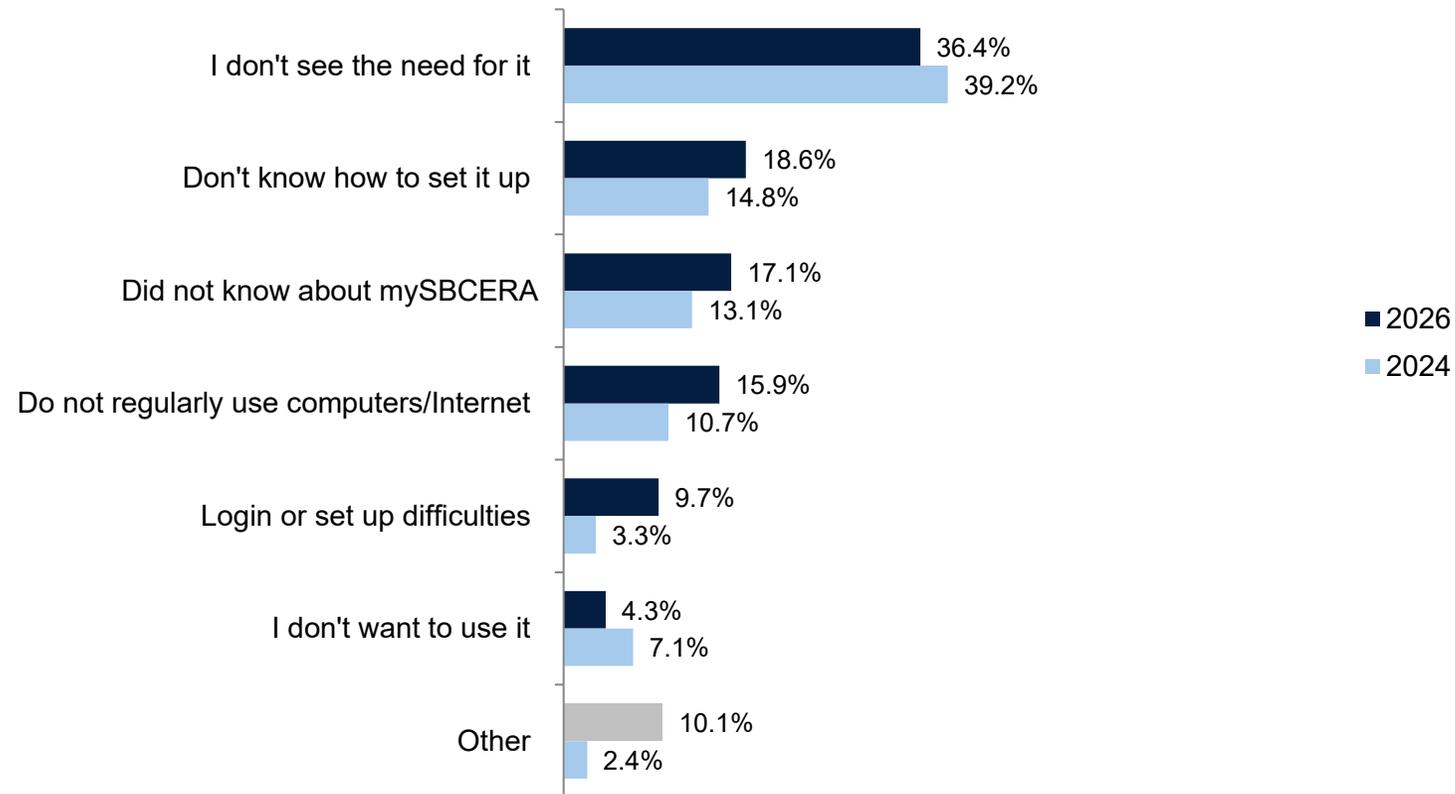
# 76% have set up a mySBCERA account

Question 19: Have you set up an online mySBCERA account to access online services?



# Many members who have not set up mySBCERA just do not see a need for it

Question 20: Why haven't you set up an online mySBCERA account? Select all that apply.  
 [ASK ONLY OF THOSE WHO ANSWERED 'NO' TO Q19]



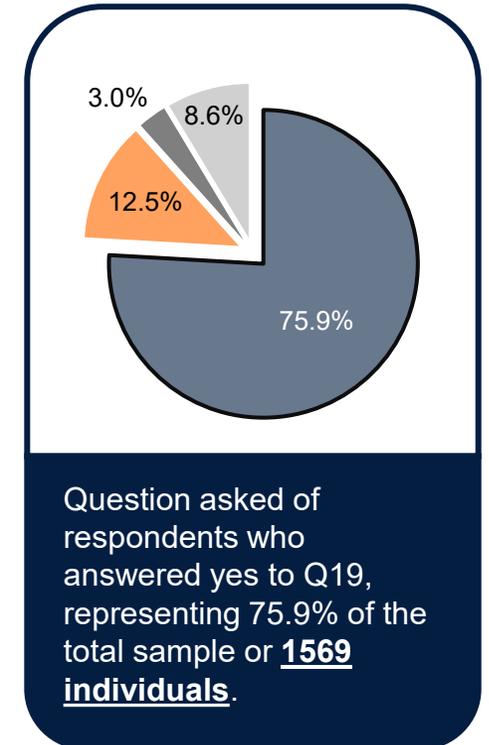
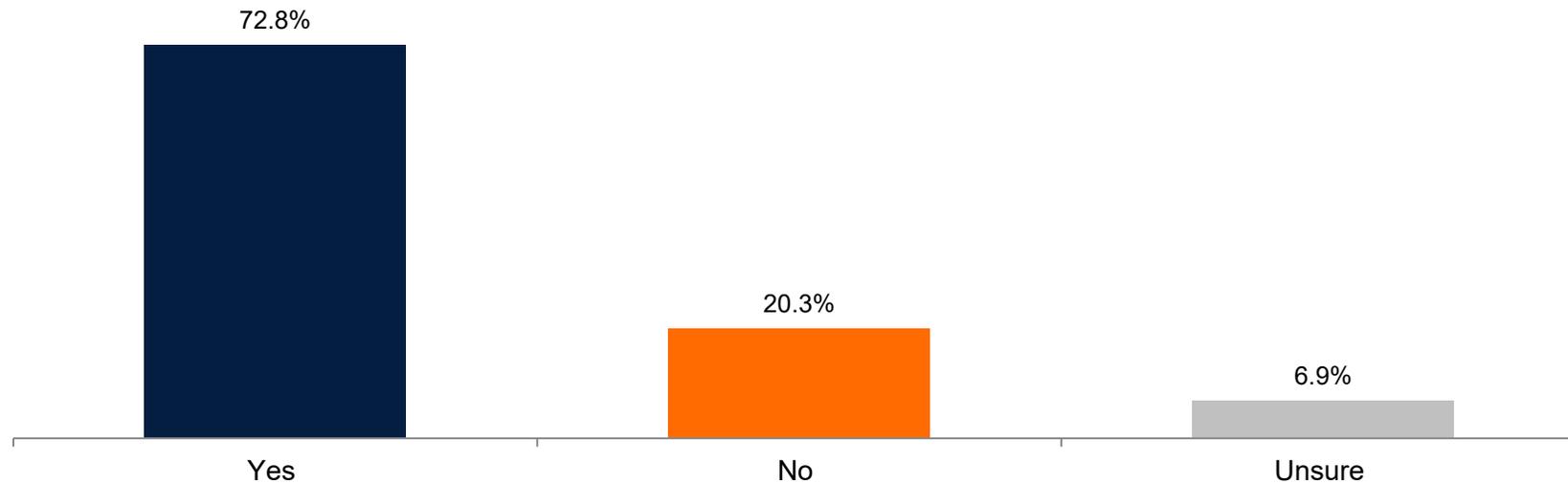
Question asked of respondents who answered no to Q19, representing 12.5% of the total sample or **258 individuals**.



\*In 2024, the question was asked as an open-ended response and coded into categories. The categories were used as a base for 2026.

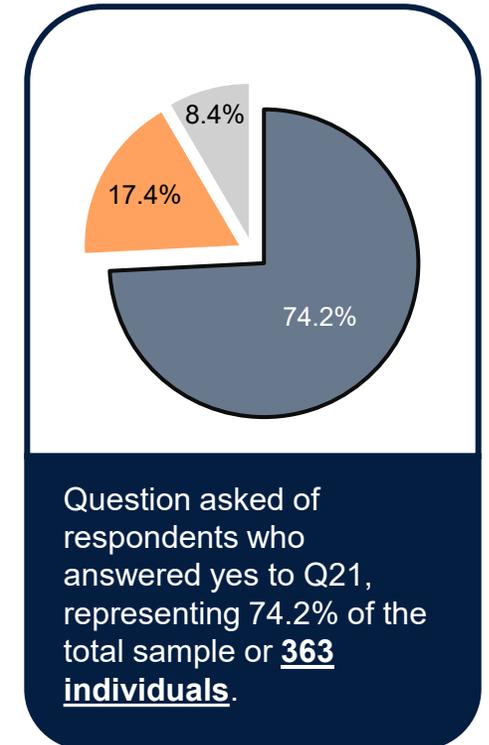
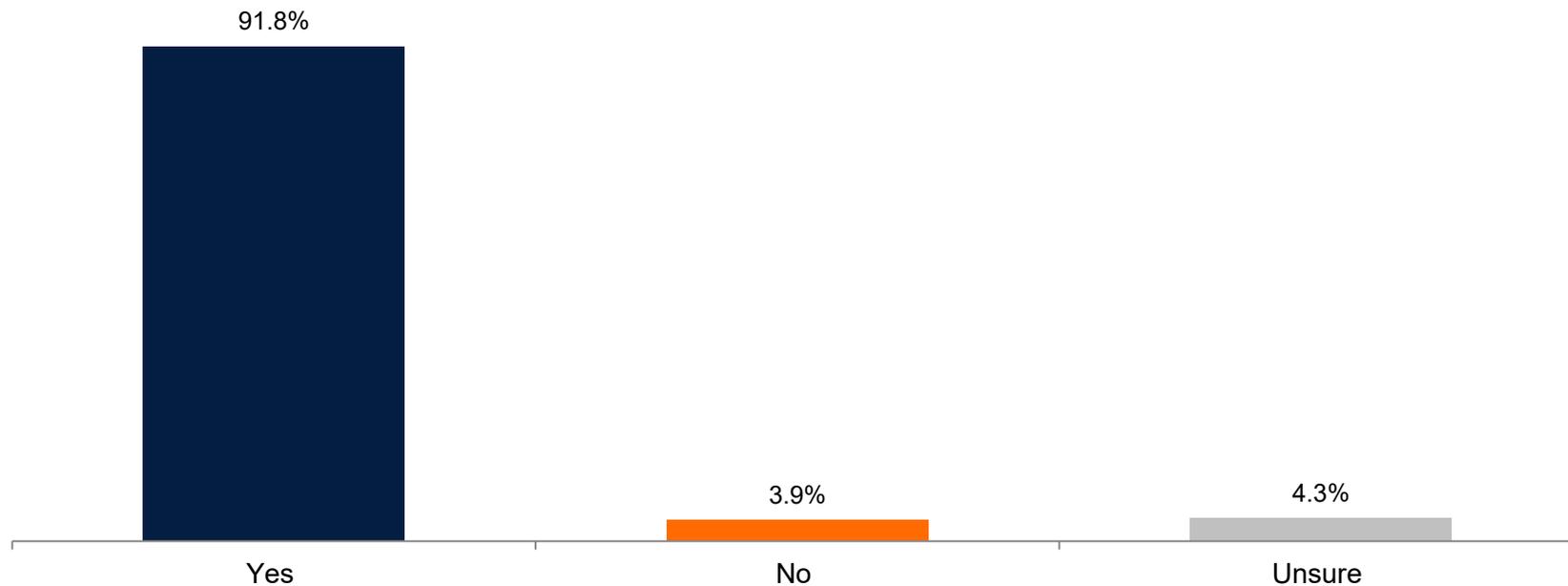
# 73% used mySBCERA in the last year

Question 21: Have you used your mySBCERA online member portal in the last year? Note: This is the member portal, not the main SBCERA website.  
[IF Q19=YES]



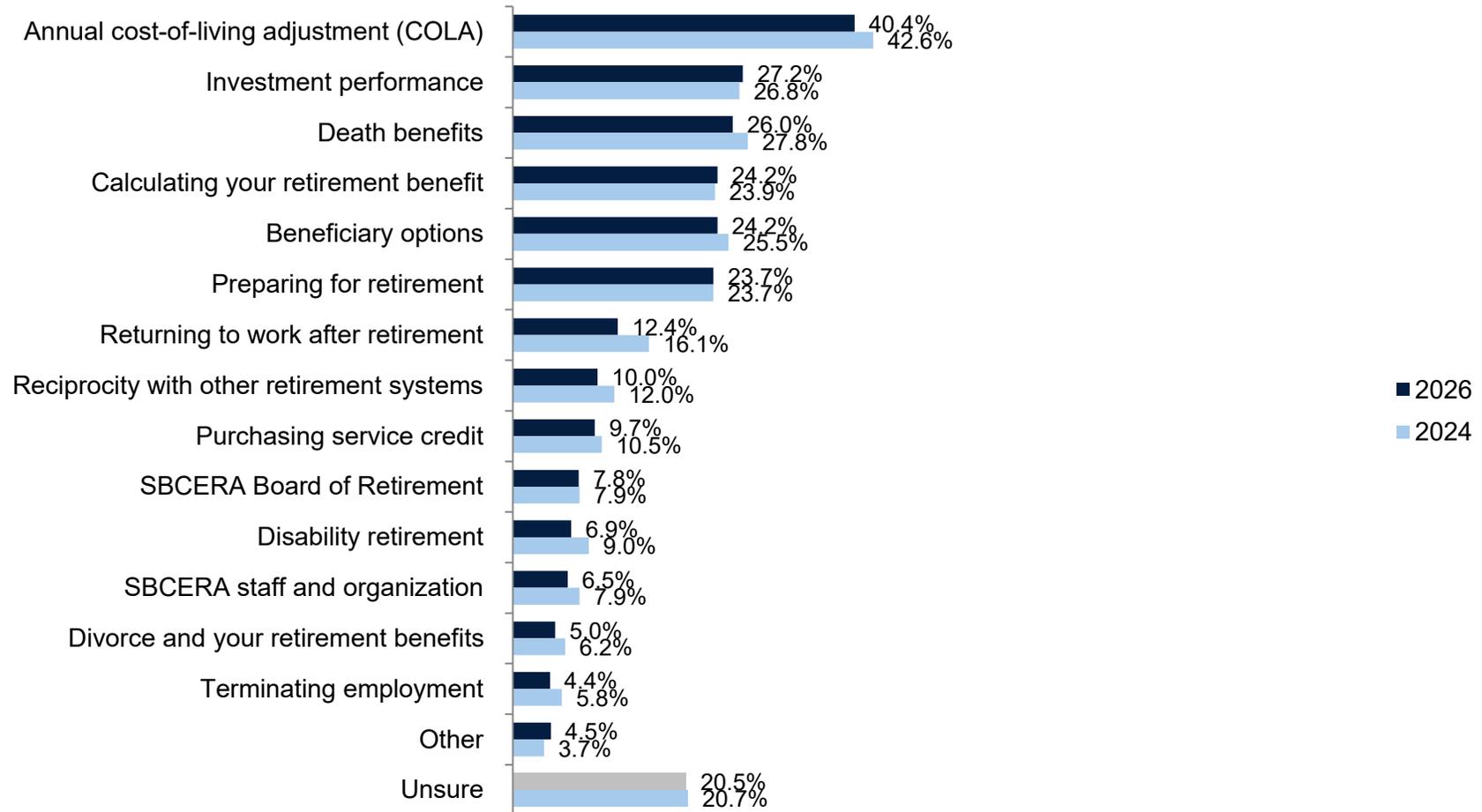
# 92% say mySBCERA is easy to navigate and user friendly

Question 22: In general, was your mySBCERA online member portal easy to navigate and user friendly?  
[IF ANSWERED 'YES' TO Q21]



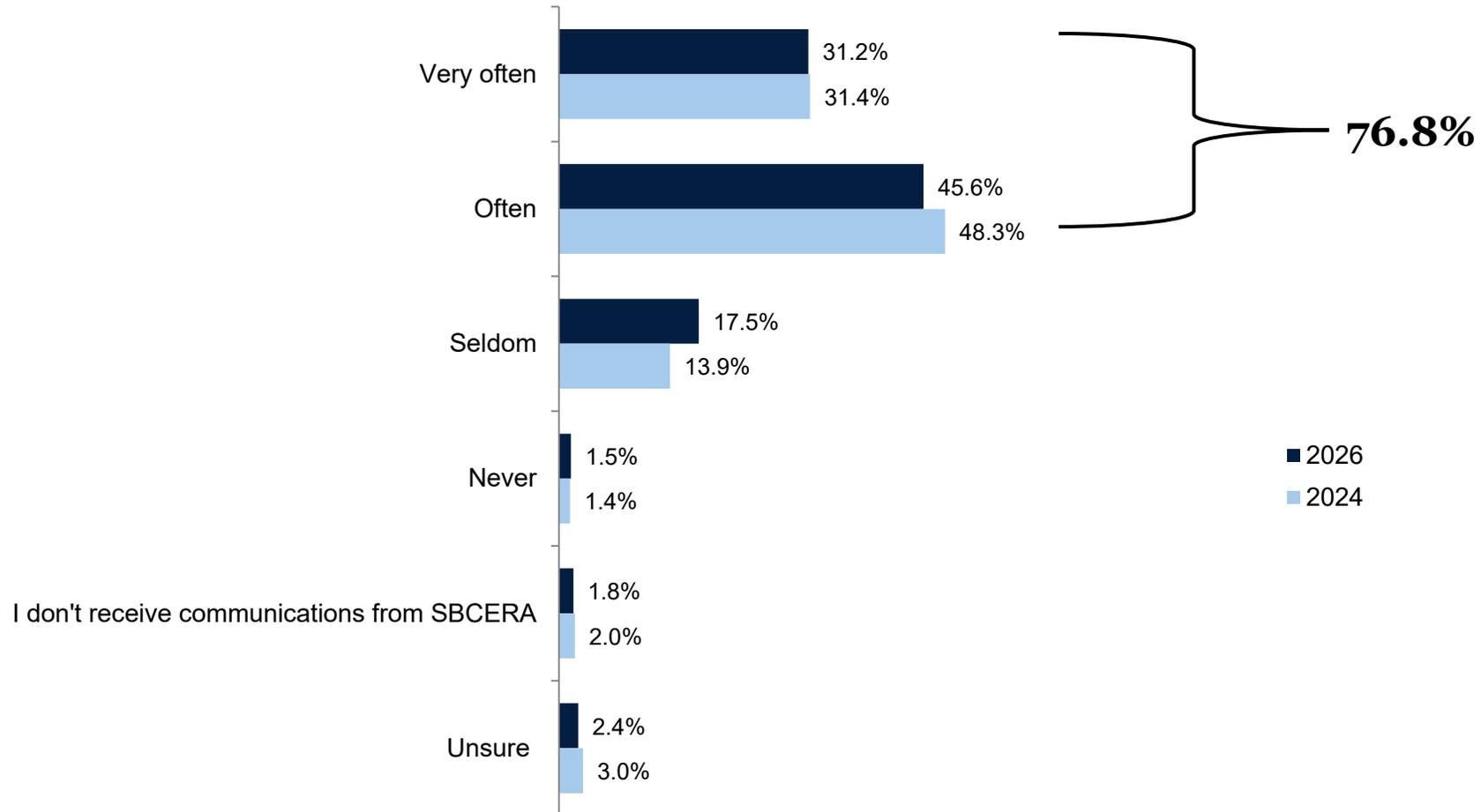
# Members most want to learn about annual cost-of-living adjustments (COLA)

Question 24: Which of the following topics would you like to learn more about from SBCERA? Select all that apply.



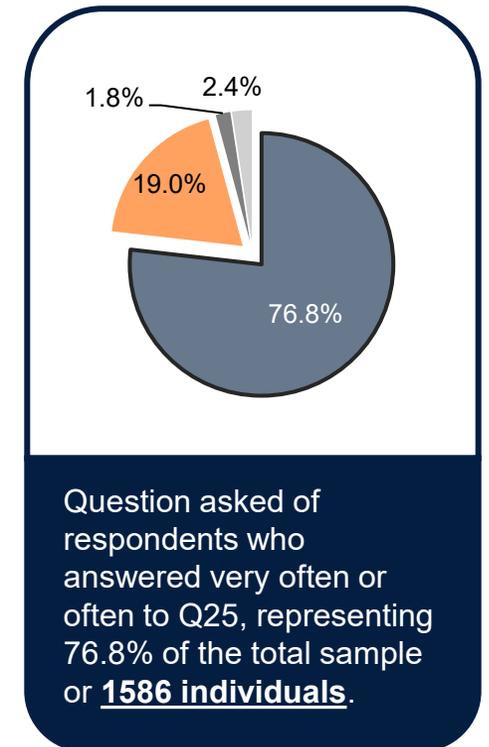
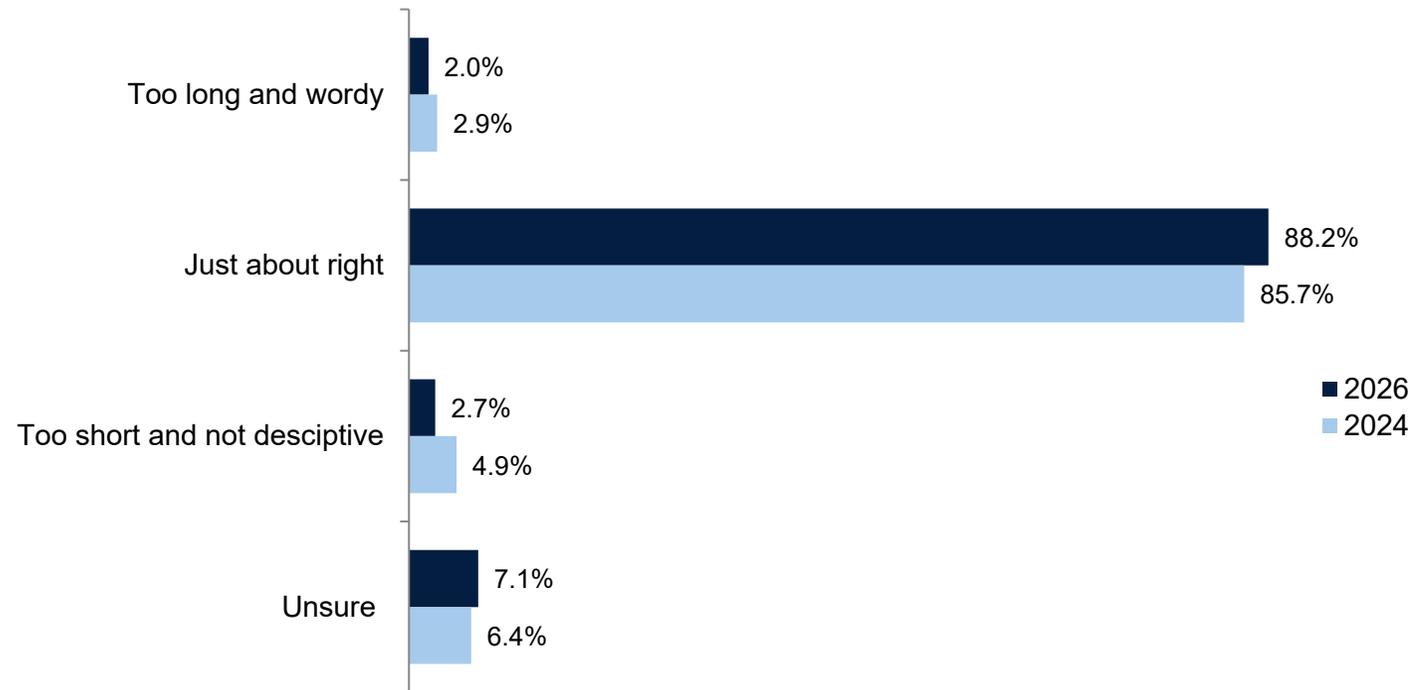
# 77% read communications from SBCERA often or very often

Question 25: SBCERA periodically sends communications to members. How often do you read communications from SBCERA?



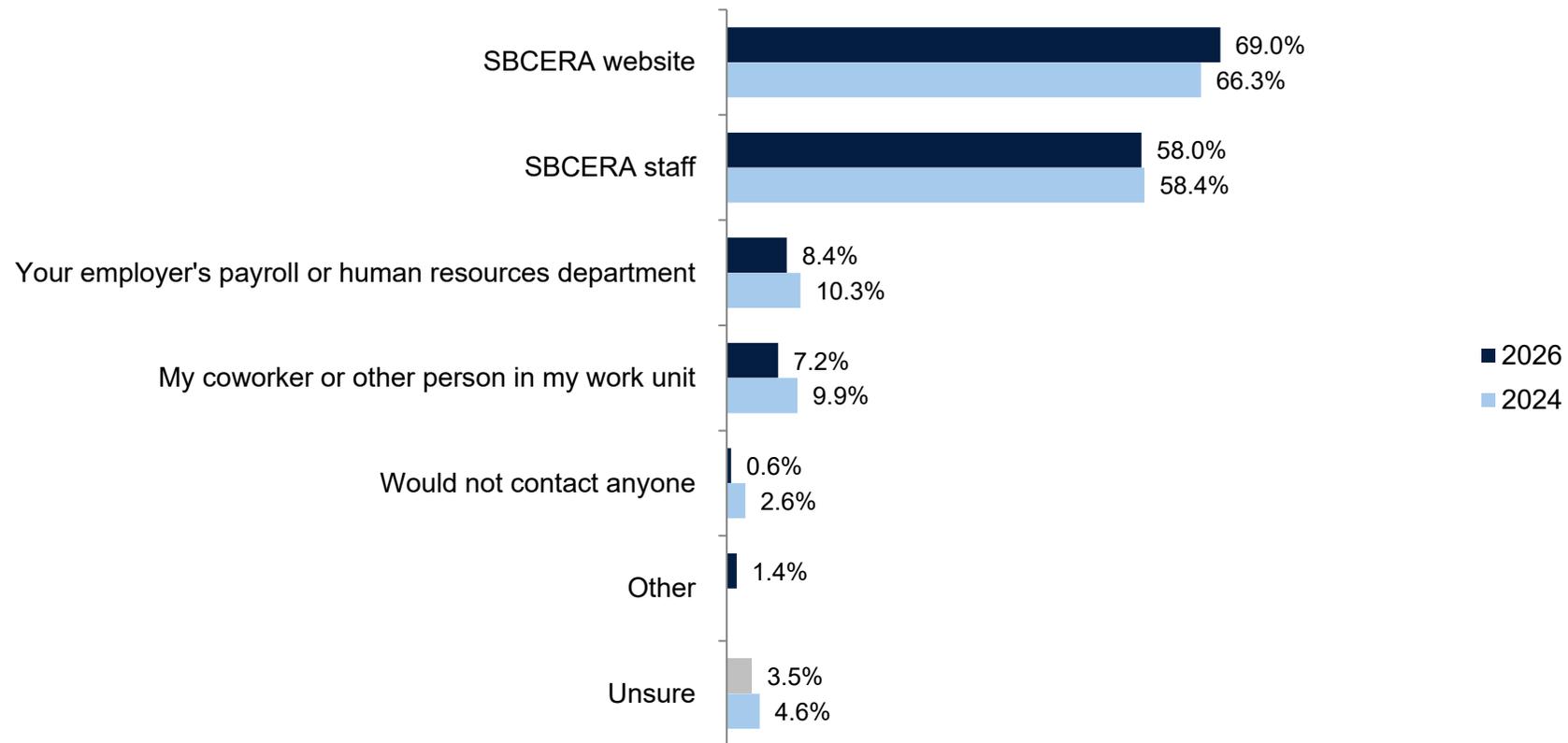
# Of those who often read SBCERA communications, 88% say they are just about right in length

Question 27: Do you think the communications you receive from SBCERA are too short and not descriptive, too long and wordy or just about right?  
[IF ANSWERED VERY OFTEN OR OFTEN TO Q25]



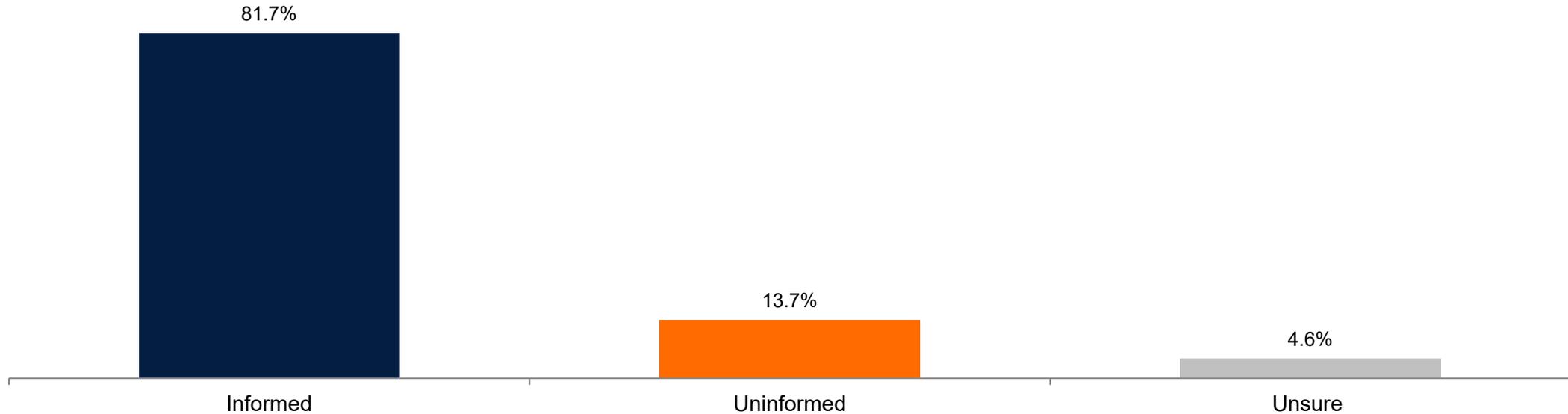
# 69% would use the SBCERA website if they had a question about retirement benefits

Question 28: If you had a question about your SBCERA retirement benefits, where would you go to find the answer? Select all that apply.



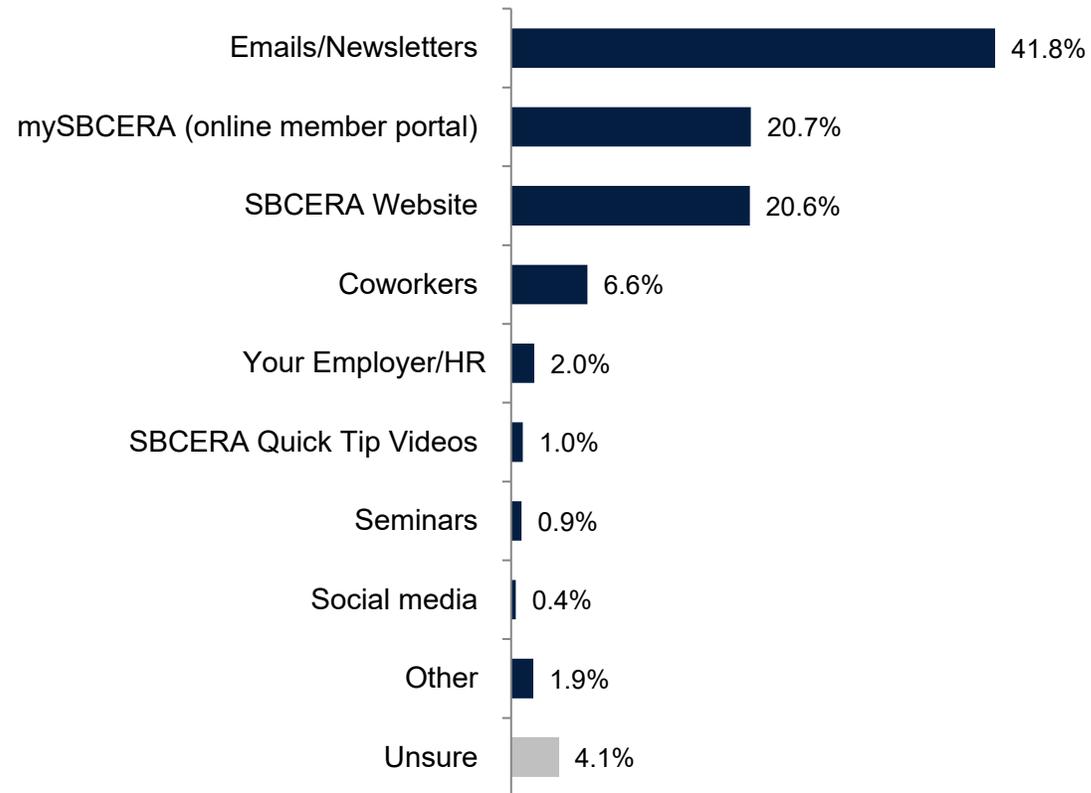
# 82% feel informed about their SBCERA benefits and the information they need for retirement planning

Question 29: How informed do you feel about your SBCERA benefits and the information you need for retirement planning at the current stage of your career/life?



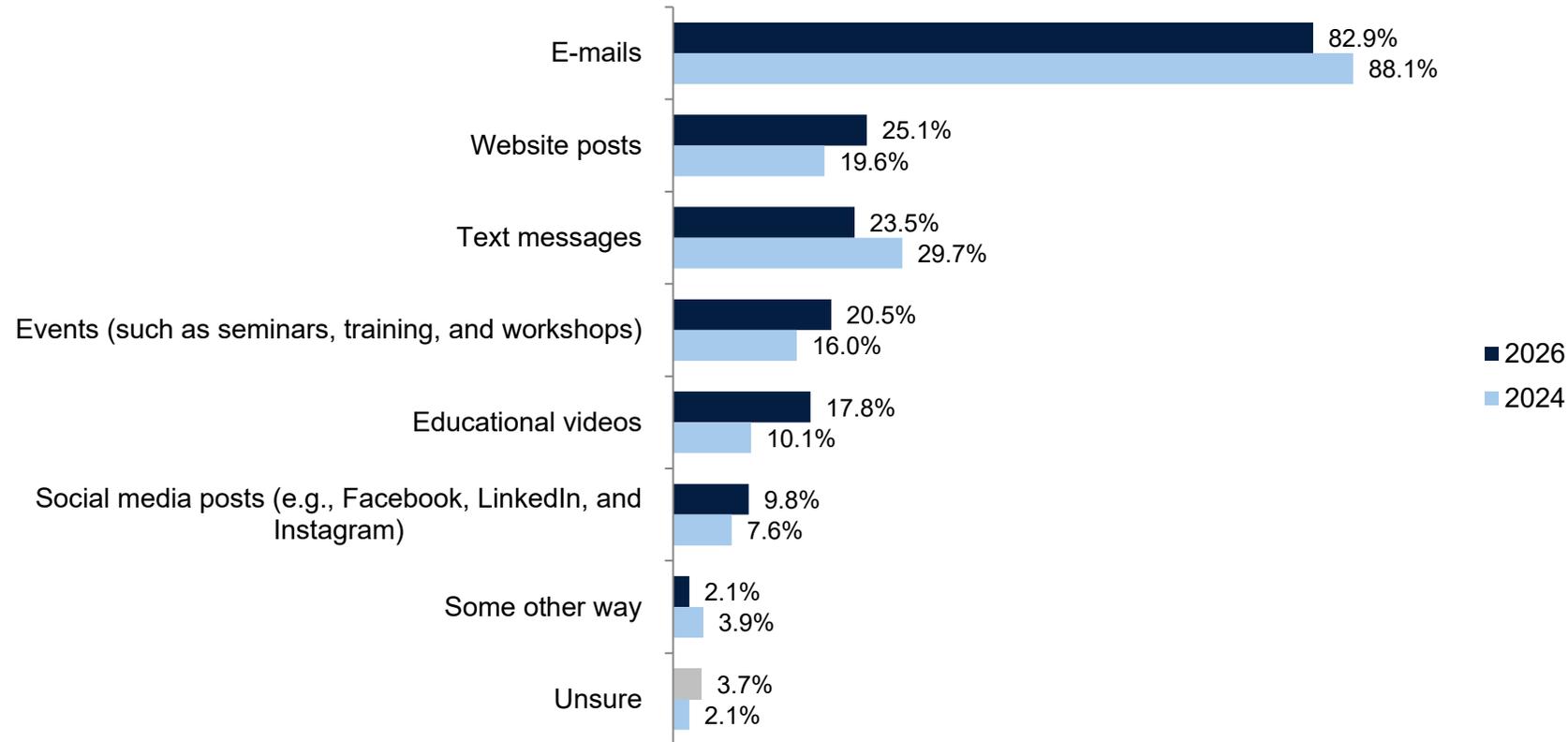
# Emails/newsletters are where members learn the most about SBCERA

Question 32: Where do you usually learn the most about SBCERA?



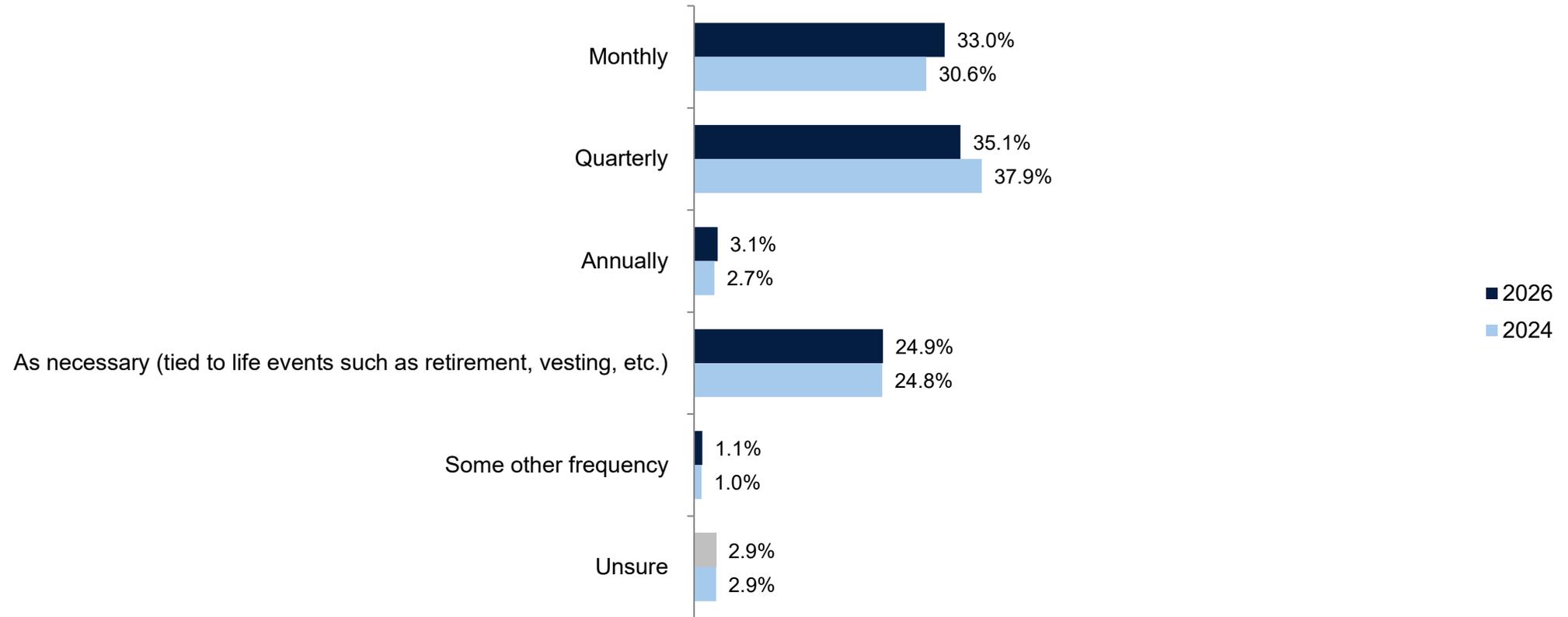
# Email is the preferred method of communication from SBCERA

Question 33: How would you prefer that SBCERA keep you informed? Select all that apply.



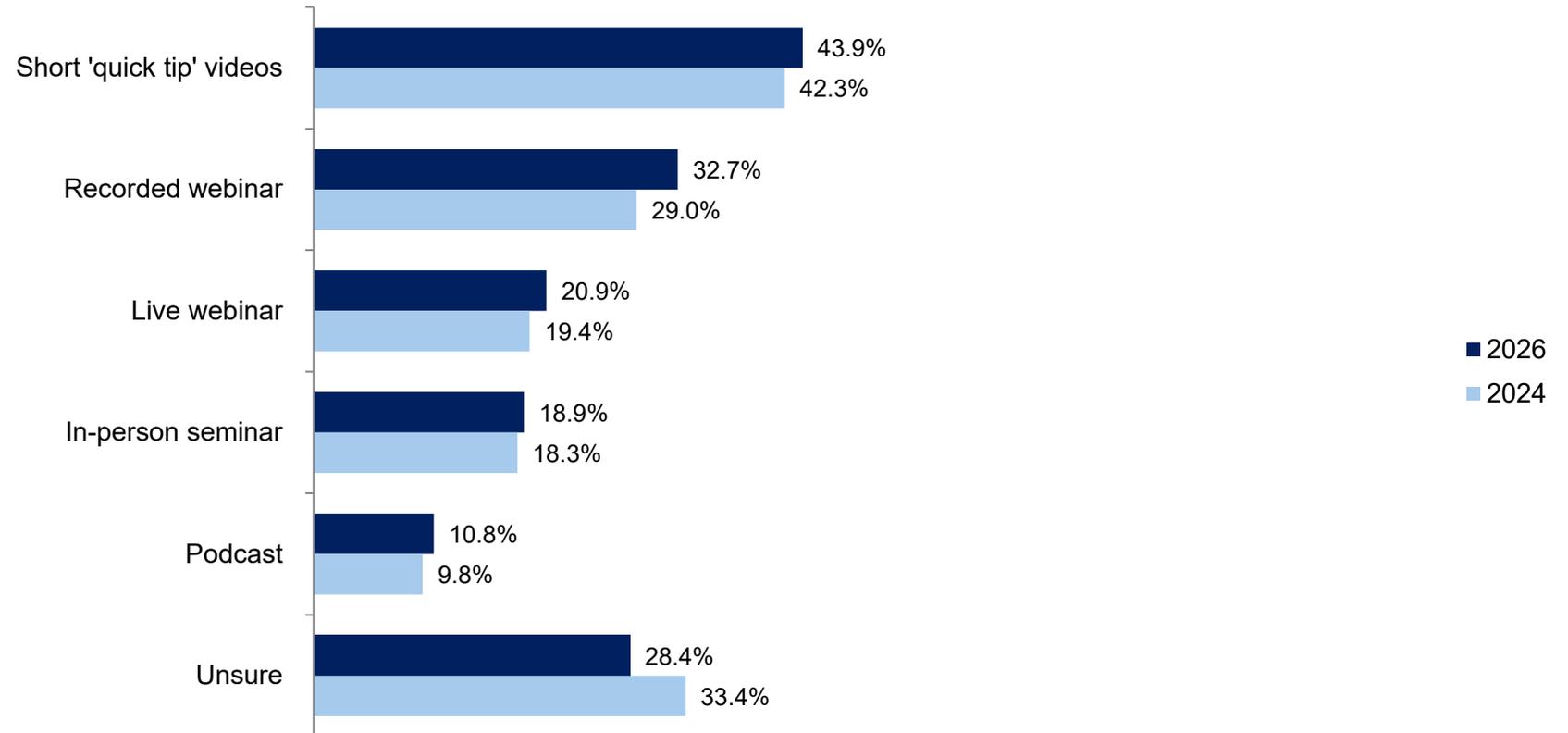
# Members prefer monthly or quarterly communications from SBCERA

Question 34: How often would you prefer SBCERA to communicate with you?



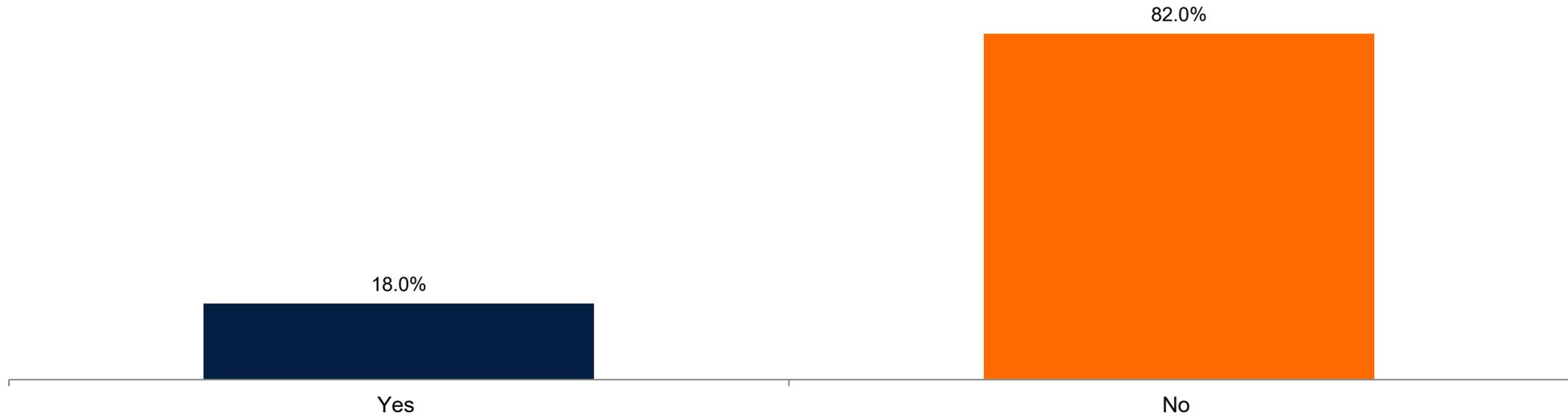
# 44% are interested in short 'quick tip' videos

Question 35: Thinking about member education, which of the following are you most interested in? Select all that apply.



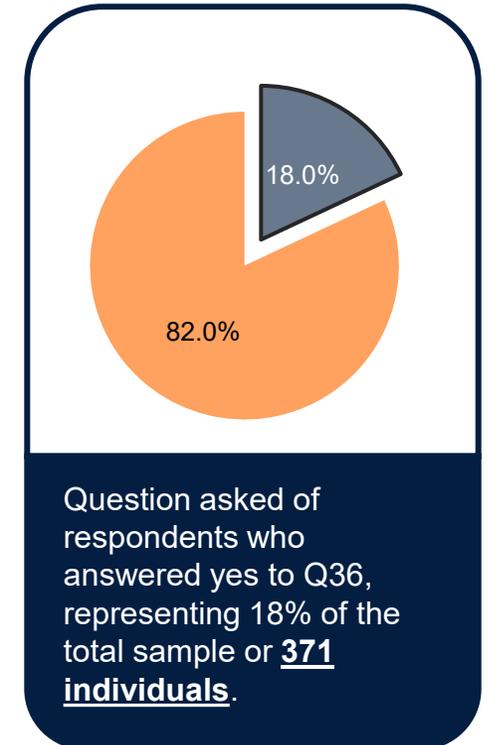
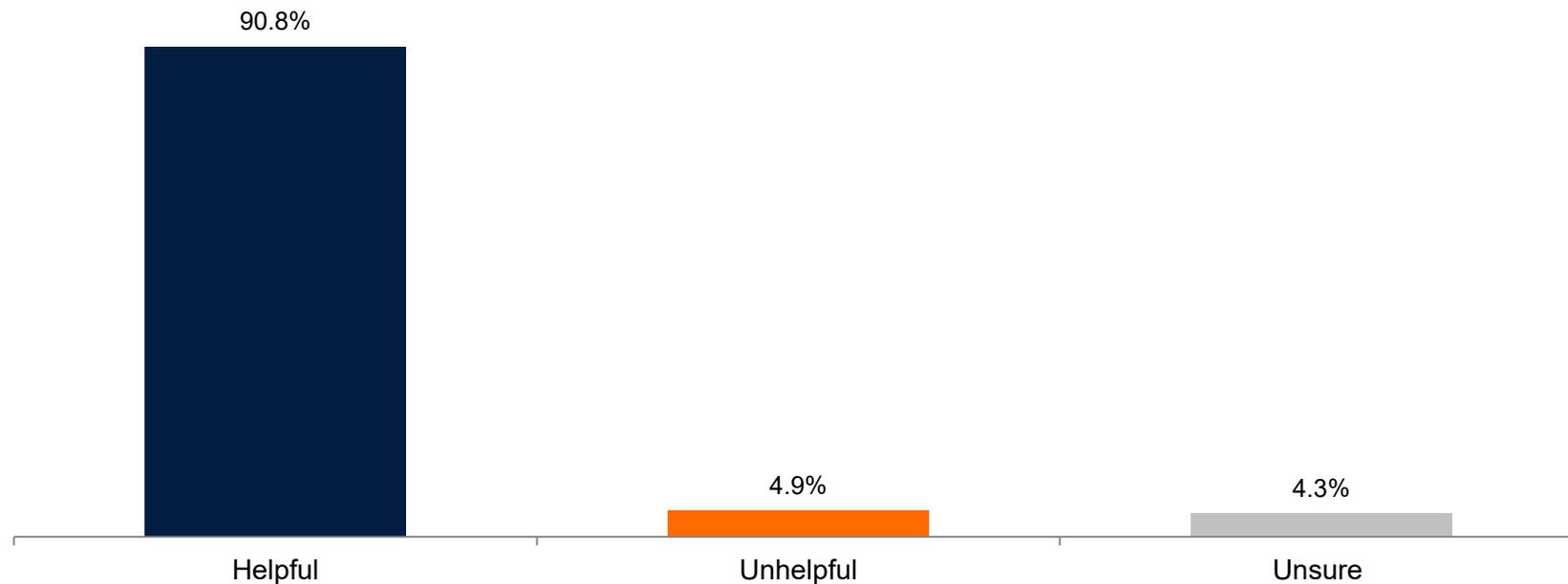
# 82% have not participated in an SBCERA Financial Education workshop

Question 36: Have you participated in any of SBCERA's Financial Education workshops?



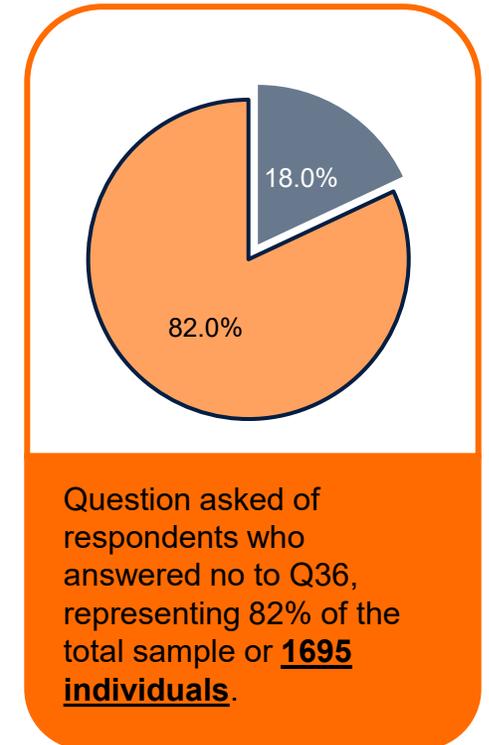
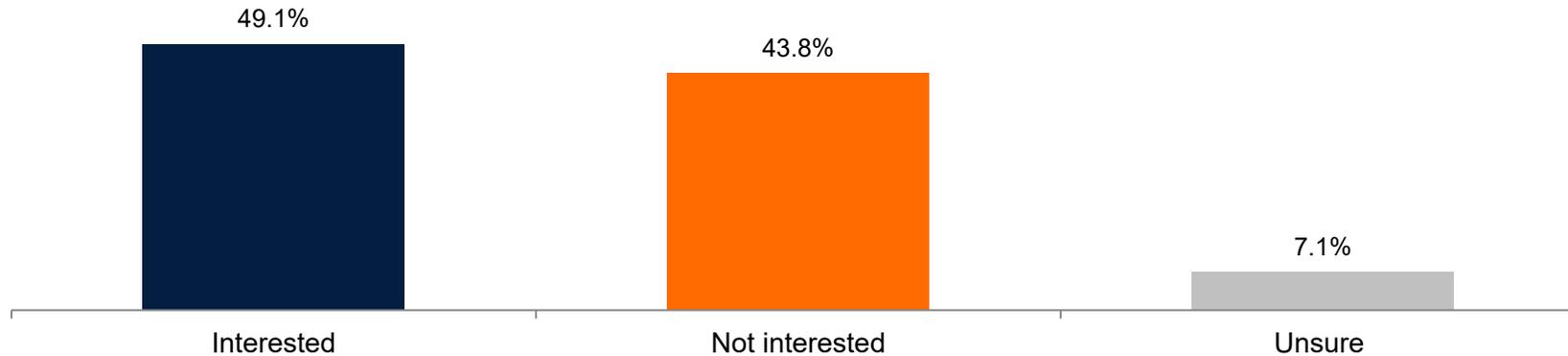
# Among those who have attended a Financial Education workshop, 91% say they are helpful

Question 37: How would you rate the helpfulness of SBCERA's Financial Education workshops?  
[IF Q36=YES]



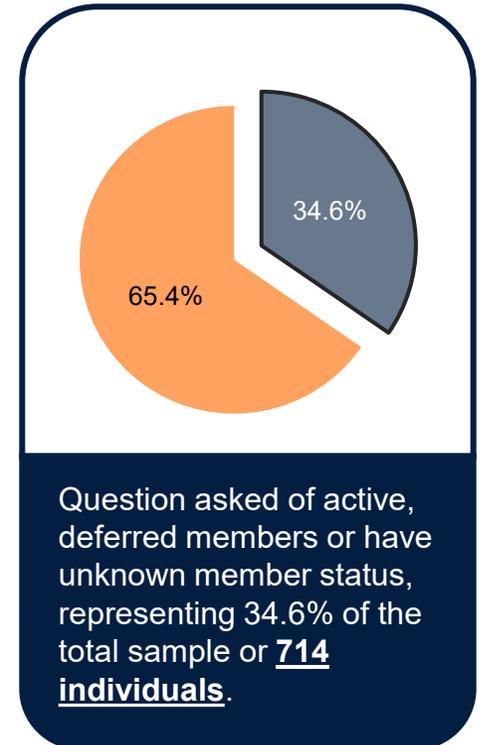
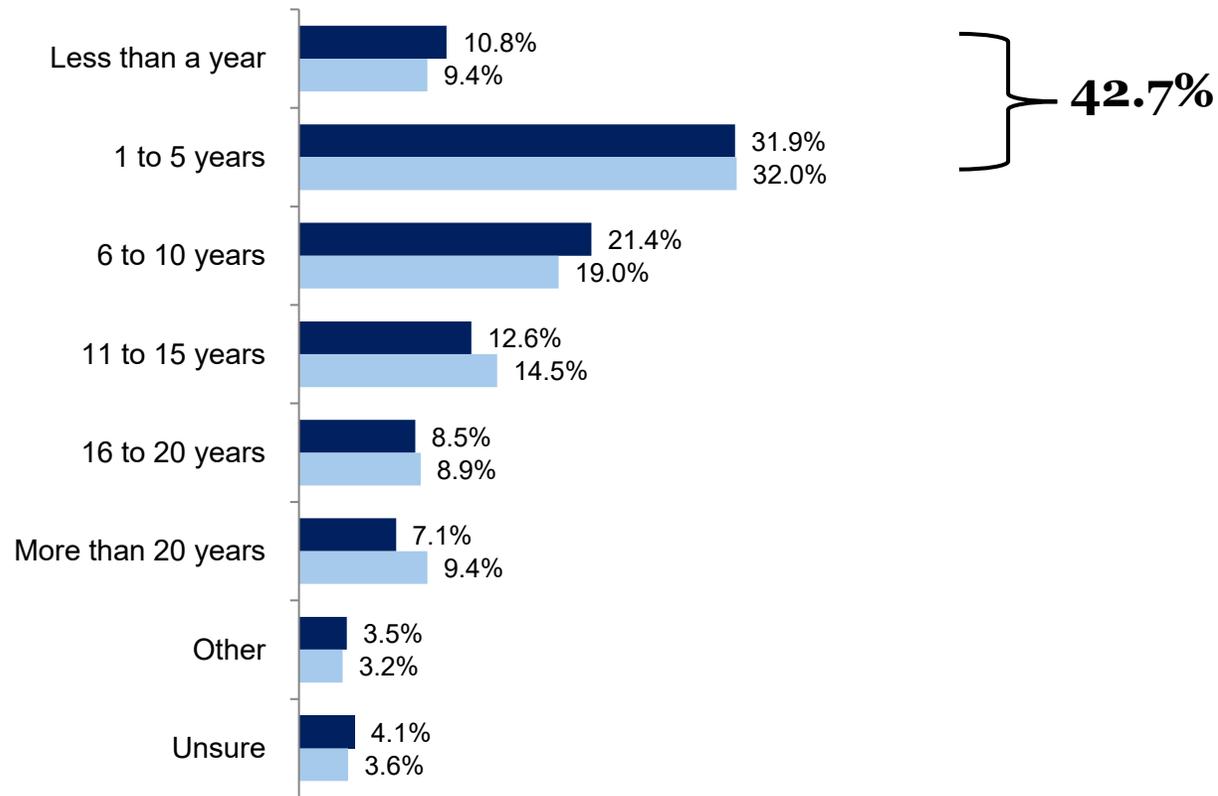
# Among those who have not attended a Financial Education Workshop, 49% are interested

Question 38: How interested are you in participating in SBCERA's Financial Education workshops?  
[IF Q36=NO]



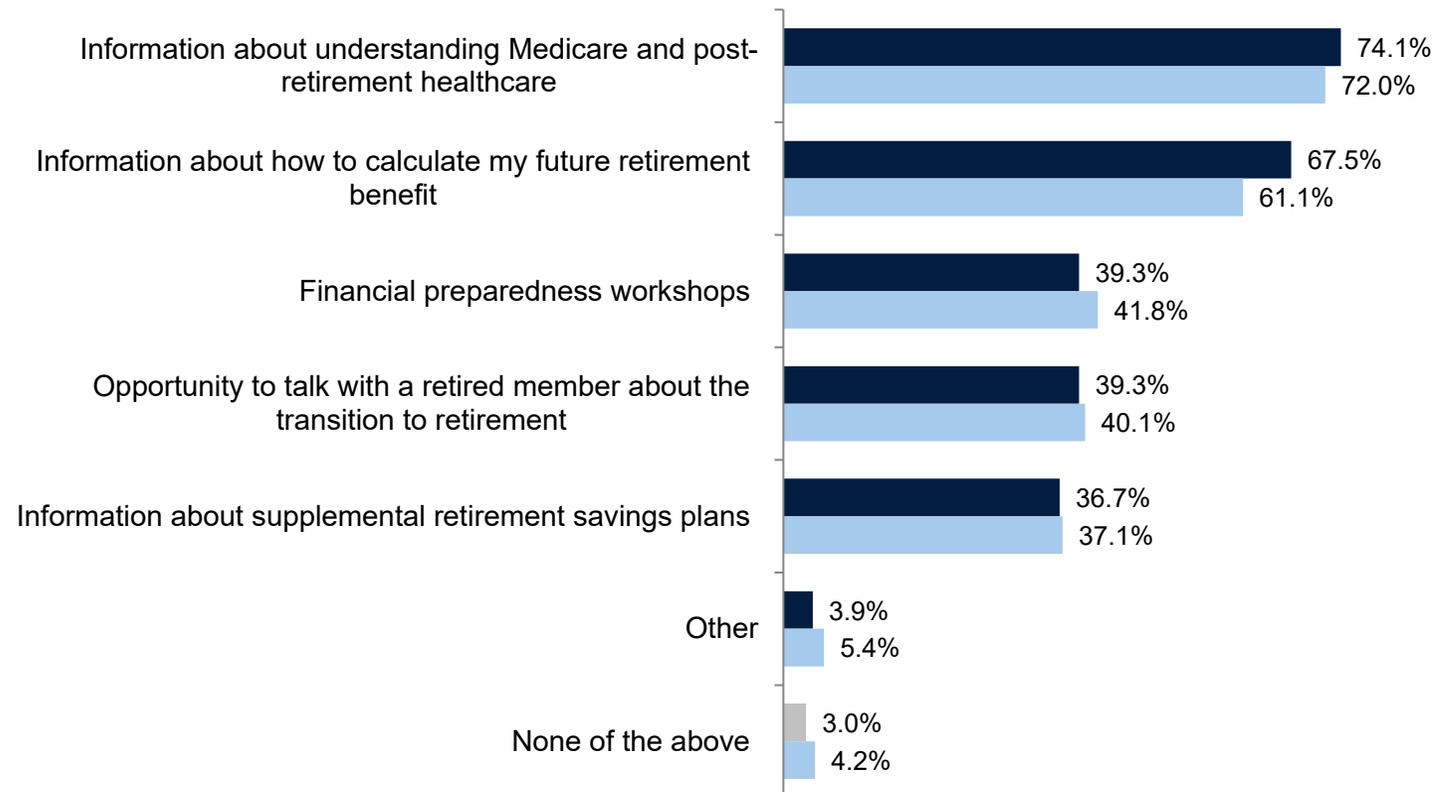
# 43% plan on retiring within 5 years

Question 39: When do you plan to retire?  
 [ASK OF ACTIVE, DEFERRED AND UNKNOWN MEMBERS ONLY]



# 74% say they would benefit most from understanding Medicare and post-retirement healthcare

Question 40: What resources would benefit you most as you get close to your planned retirement? Select all that apply  
 [ASK ONLY OF THOSE WHO ANSWERED 'LESS THAN A YEAR' OR '1 TO 5 YEARS' TO Q39]

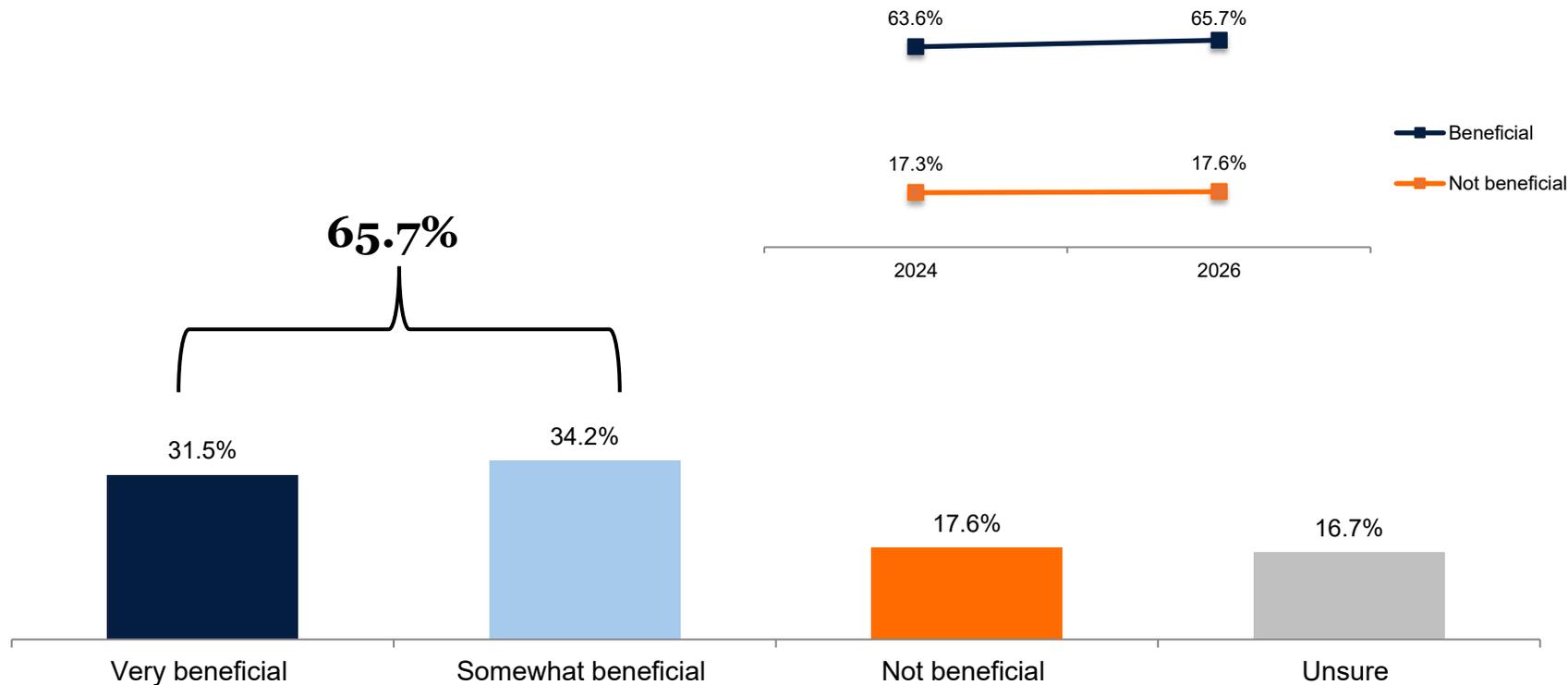


Question asked of respondents who answered less than a year or 1 to 5 years to Q39, representing 42.7% of the total active, deferred and unknown member status or **305 individuals**.

# 66% say it would have been beneficial to talk with a retired member about the transition to retirement

Question 41: How beneficial do you think it would have been to talk with a retired member about the transition to retirement? For example, this could be part of a peer support program for retirees.

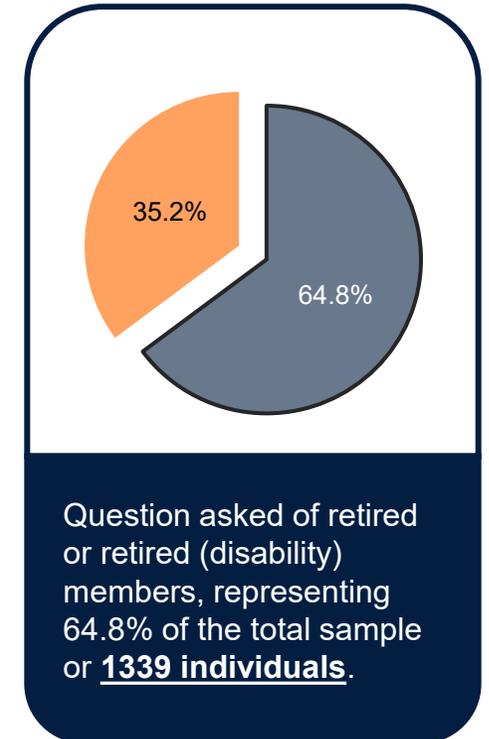
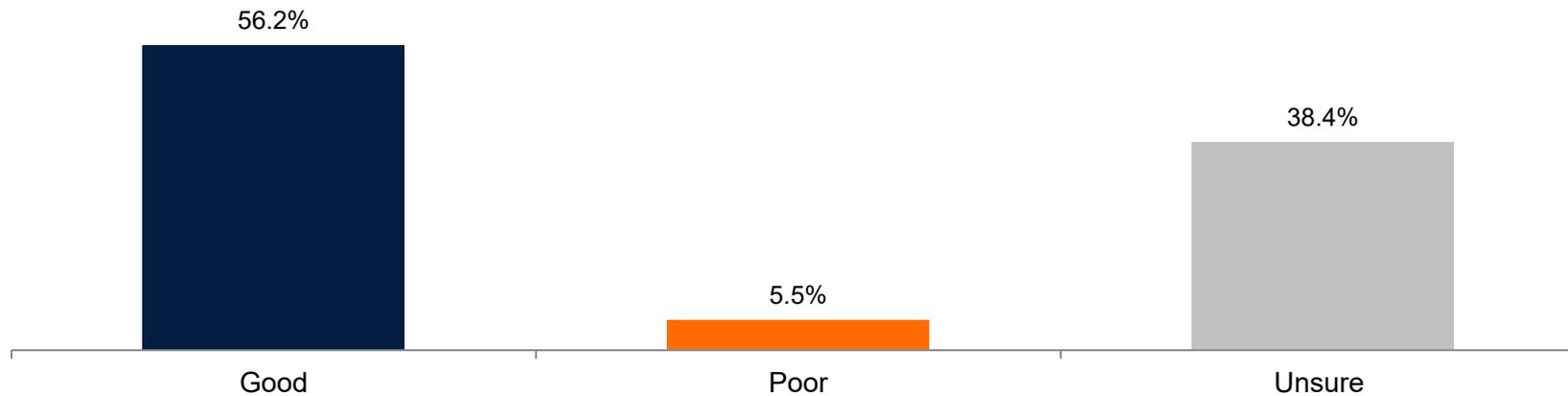
[AMONG RETIRED AND RETIRED (DISABILITY) MEMBERS]



Question asked of retired or retired (disability) members, representing 64.8% of the total sample or **1339 individuals**.

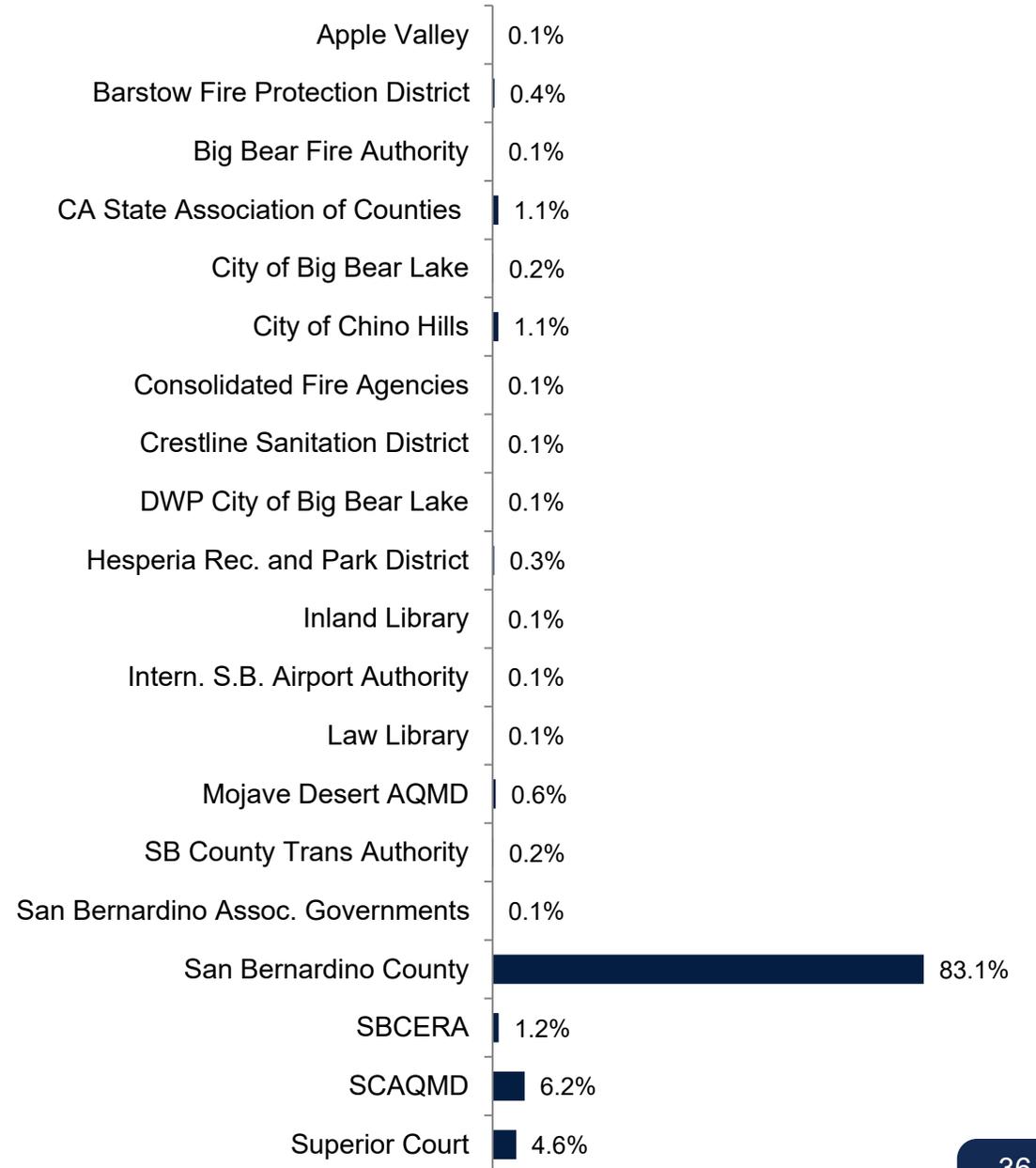
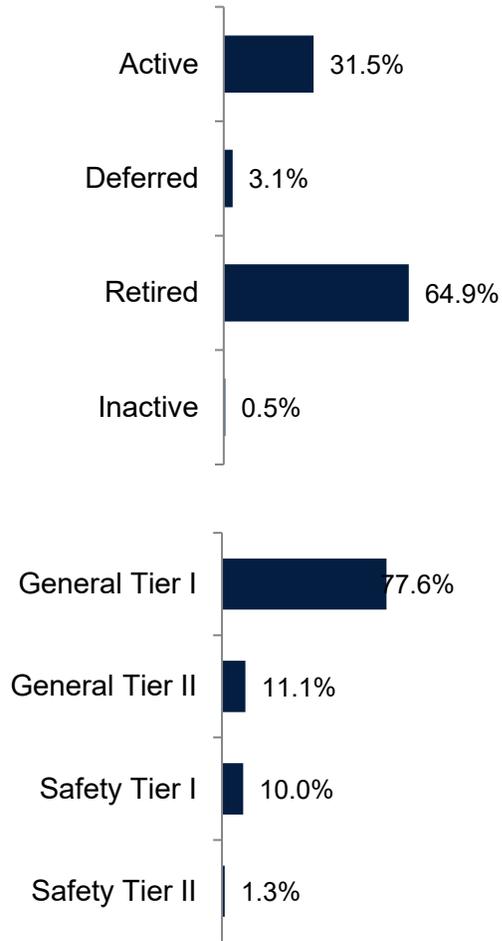
# 56% positively rate the availability of SBCERA's retired member support and education

Question 42: How would you rate the availability of retired member support and education provided by SBCERA?  
[AMONG RETIRED AND RETIRED (DISABILITY) MEMBERS]



# Demographics

# Sample Demographics



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# Questions?

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**Opinion Research on  
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