



# Strategic Communications Plan Update

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Director of Communications & Stakeholder Relations

# Our Purpose

As communicators, we are tasked with the responsibility of enhancing trust, credibility, and transparency for those we serve.

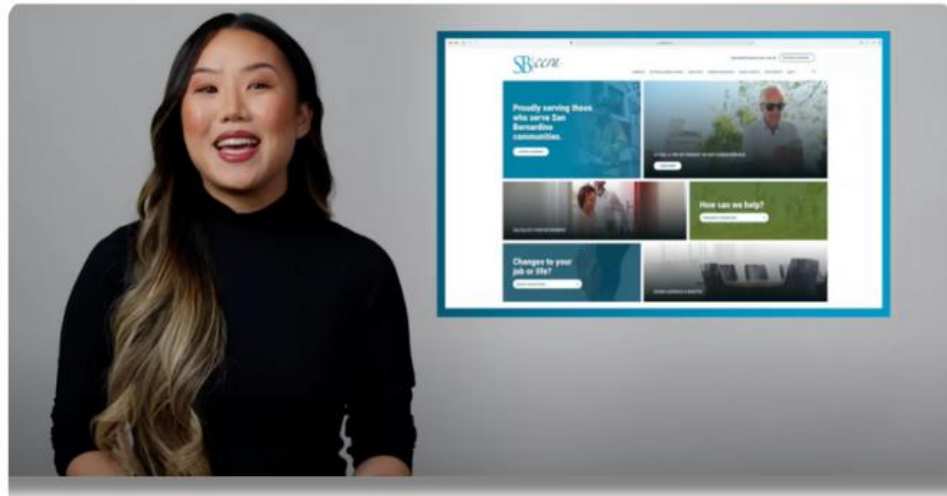
It's our job to ensure our members are well-informed, engaged, and truly understand the information being delivered.



San Bernardino County Employees'  
Retirement Association

# Collateral Development

# Quick Tip Video Series



In our member engagement survey, most members said they were most interested in “quick tip” videos.

In response, we launched our Quick Tip video series, driven by frequently asked questions and direct feedback from members.

# WE ARE SB | *cera*



**WE ARE**  
**SB** | *cera*

We created a video series designed to feature stories about the people who define SBCERA.

Through this series, viewers will get an inside look at the people who provide the important public services our communities depend on, and they'll learn how the retirement security SBCERA provides gives them confidence in their futures.

These stories are full of personal experiences, purpose, the impact of service, and so much more.

“Congratulations on a fresh and thoughtful presentation of all that SBCERA truly is. Thank you for the opportunity to be part of this effort.”

“I got goosebumps watching the video.  
You are all doing great things at SBCERA.”

“I had a lot of fun filming, and the overall experience was fantastic. Thank you again for allowing me to share my story.”

# Member Outreach



# Financial Education for Members

- Introducing Financial Education Workshops
- Partnering with with Voya and Other Defined Contribution Plans

# Elevating Retirement Support

- Retiree Mentorship Pilot Program
- Educational Workshops
- Retiree Resource Page

# Stakeholder Relations

# Labor Group Outreach

Early this year, we met with labor groups to bring them up to speed on our top member resources and discussed how we can continue to collaborate in getting retirement planning information to their members.

# Stakeholder Management System

We introduced a stakeholder management software, Jambo, which has given us the ability to track key personnel and contacts across all our stakeholders. Beyond this, we can track communication, key themes, issue resolution, and more.

# Employer Forum

Our first Employer Forum will be held on **February 5, 2025** at SBCERA. This event is designed to inform, educate, and empower our employers in their role as a valued SBCERA participating employer.

# Responsible Advocacy

We introduced our first Legislative Principles and Guidelines that provide the framework for SBCERA to pursue responsible legislative advocacy in accordance with priorities adopted by the Board of Retirement.

We've been able to be more proactive in the legislative process when proposed legislation has potential impact on SBCERA's ability to properly administer the retirement system and meet its commitments to our members and their beneficiaries.

# Internal Communications



# Internal Communications Plan

Our team is working on an Internal Communications Plan that ensures intentional, timely, and consistent communication to all staff.

# Employee Onboarding & Engagement

Our team continues to work closely with Human Resources to expand the curriculum and experience for employee orientation, onboarding, and overall engagement.

# Prioritizing Diversity, Equity, and Inclusion

Our team continues to work collaboratively with Human Resources on evaluating SBCERA's diversity, equity, and inclusion efforts.

We are committed to strengthening external and internal communication elements geared towards this goal.

# Measuring

# Measuring Our Work

## Member Engagement Survey

We continue conducting biannual member engagements surveys, where we gather feedback regarding member experience, communications, outreach, and overall perceptions from our members.

## Metrics & Feedback

We continue tracking metrics through Google analytics, website analytics, social media analytics, and organic feedback from members and stakeholders.

## HOW WE'RE TRACKING

**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.

## AWARDS & RECOGNITION

### CAPIO

2023 – EPIC Award

2024 – 1 EPIC Awards

### PRSA

2023 – Polaris Award

2024 – Pending Polaris Award

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