



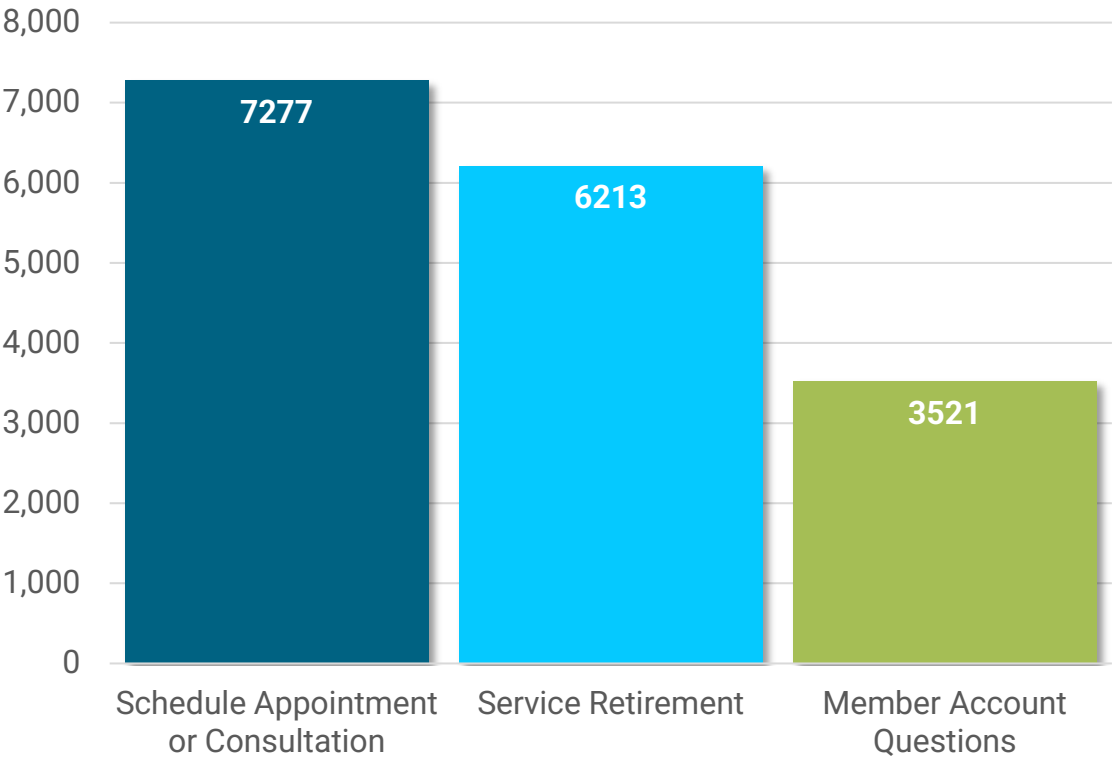
Member Services Performance Metrics – 2025

By Christina Cintron, Chief of Member Services

Contact Center Demand & Call Drivers – 2025

Serving Members Consistently, All Year Long

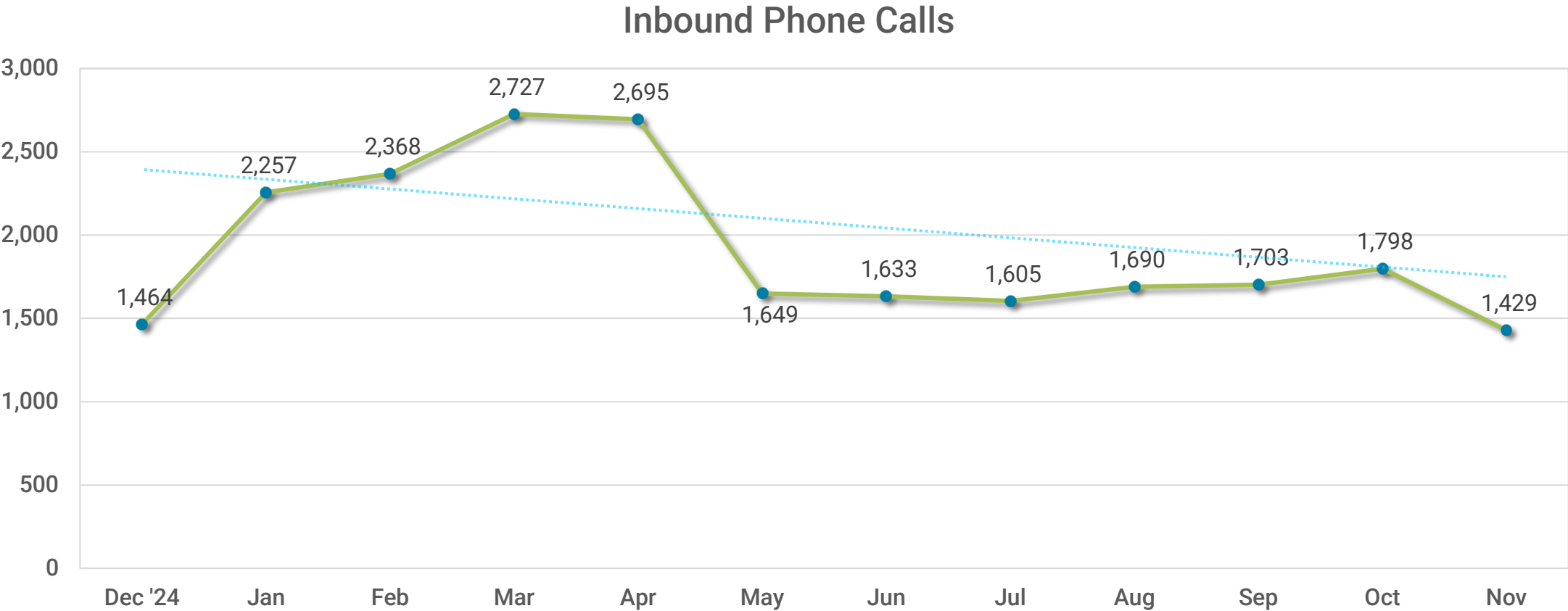
Primary Drivers of Call Volume



- **Total Calls Taken:** 23,018
 - Busiest Phone Day:** March 3 (212 calls)
 - Busiest Phone Month:** March (2,727 calls)
- **Average Handle Time:** 7 minutes, 42 seconds
- **Top Call Reasons:**
 - Schedule Appointment or Consultation (7,277)
 - Service Retirement (6,213)
 - Member Account Questions (3,521)

Inbound Call Volume Trends

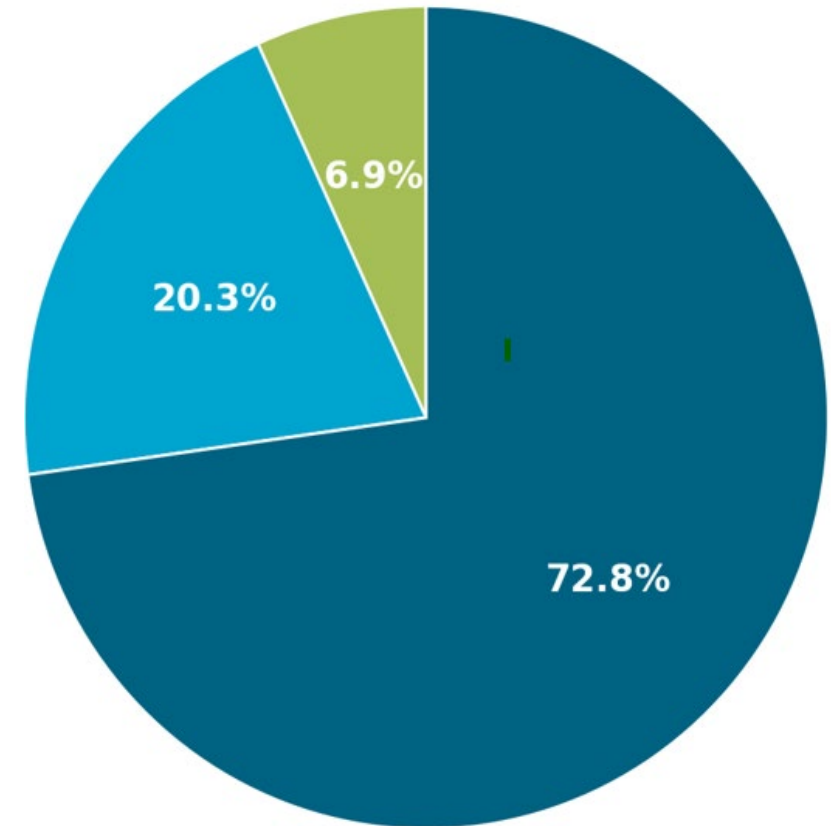
Higher Call Demand Early in the Year, Followed by Seasonal Stabilization



Member Consultations – Service Delivery Mix

Balancing Access, Preference, and Capacity

- **Total Consultations Completed:** 1,160
 - **Virtual:** 79 (6.9%)
 - **Phone:** 234 (20.3%)
 - **In-Person:** 837 (72.8%)
 - Includes 121 walk-in appointments



Member Education – Delivery Overview

Balancing Reach, Access, and Staff Capacity

Member Services participation in education sessions:

- Pre-Retirement Seminars/Webinars: **8**
- New Employee Orientations: **26**
- Retirement Overview Seminars: **8**
- Mid-Career Seminars: **2**

Total Count: 44

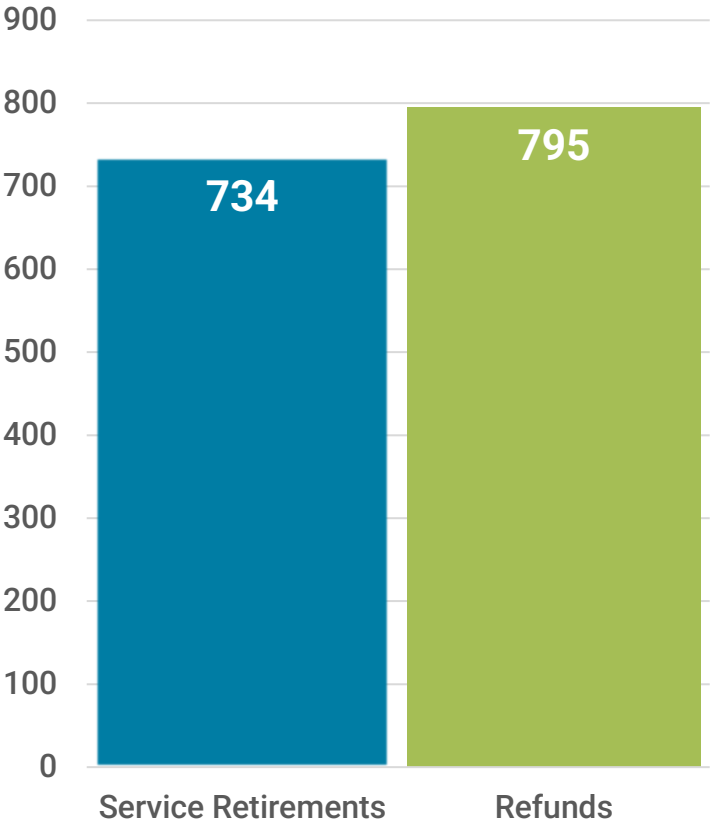


* The Communications Team schedules and facilitates member education sessions. Metrics shown reflect events attended by Member Services staff.

Service Retirements & Refunds

Applications Received and Processed by Member Services

- Service Retirements: **734**
- Refunds: **795**



* Member Services collects and processes applications; Fiscal Services completes payment setup.

Member Contact Highlights

Key Member Interactions and Completed Service Activity

- Member Lobby Visits: **2,284**
- Member Contact Log Entries: **36,900**
- Workflow Steps Processed: **26,064**
- Members Served: **~5,811***

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- Busiest Phone Call Day: **Monday**
 - Busiest Lobby Visit Day: **Monday**



Each touchpoint represents a moment of member support – delivered with professionalism and care.

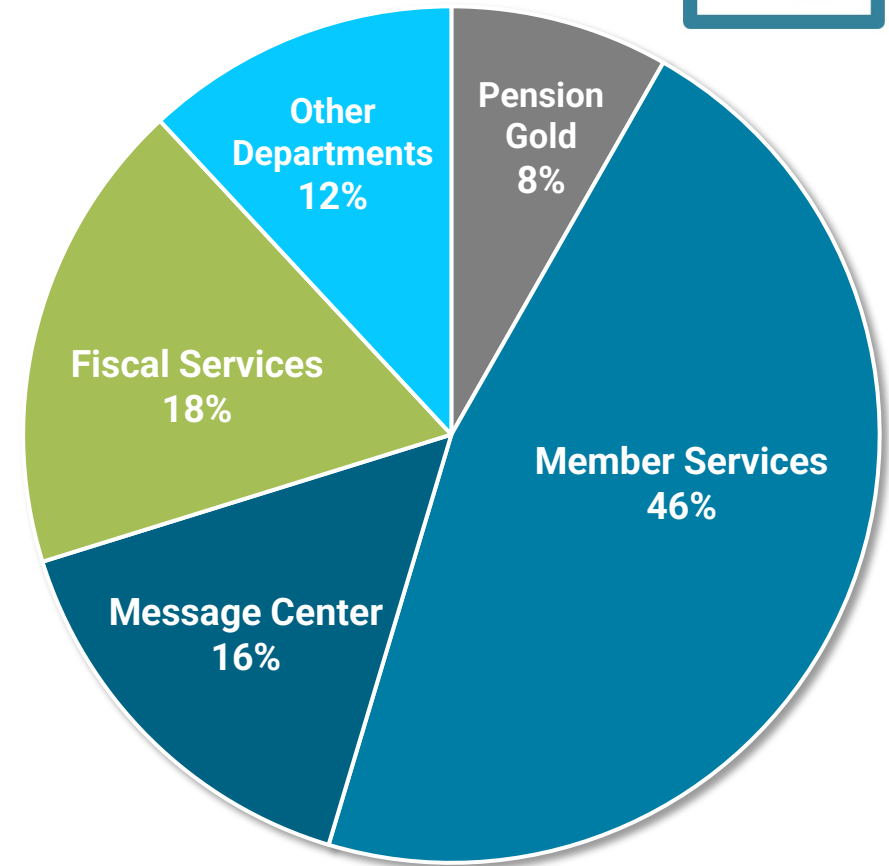
* "Members Served" reflects completed service retirements, refunds, and account changes only; it does not include phone calls, lobby visits, or general inquiries.

Scanning & Imaging Productivity

Member Services Drives the Majority of Member Imaging Volume



- Total Documents Imaged: **71,798**
 - Member Services (62% of all member imaging):
 - Scanned & indexed documents: **33,303**
 - Message Center documents indexed: **11,182**
 - Pension Gold: **5,919**
 - Fiscal Services: **12,842**
 - Other Departments:
 - Disability Retirement Unit: **5,542**
 - Legal Services: **2,686**
 - Survivor Benefits Unit: **299**
 - Information Services: **25**



What the Numbers Tell Us

The data reflects consistent, high-impact service delivery across the year.

- **We sustained high call volumes** throughout the year.
- **We supported members through complex retirement decisions** with consultations and education.
- **We balanced phone, in-person, walk-in, and virtual channels** to meet members wherever they were.
- Service delivery remained professional, consistent, and aligned with SBCERA's strategic goals and member experience priorities.



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