



# Strategic Communications Plan Update

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San Bernardino County Employees'  
Retirement Association

# 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.

# WE ARE SB|cera

San Bernardino County Employees  
Retirement Association



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

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

Through this series, we've provided an inside look at the people who provide the important public services our communities depend on, and 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.



# Financial Education Courses Available



[SBCERA.org/Financial-Knowledge](https://SBCERA.org/Financial-Knowledge)

# Financial Education Program

Whether a member is retired or planning for retirement, informed financial planning is essential to achieving their financial goals.

As part of SBCERA's Strategic Priorities, we launched a program in partnership with Financial Knowledge to provide free financial education courses to our members.

All courses are conducted by certified financial planner professionals and designed to empower our members in managing their personal finances.

# Financial Education Courses





# Most Members Say

- Their knowledge after attending the course was **above or far above average**.
- The information was **easy or very easy to understand**.
- The information was **very or extremely useful**.
- The instructor's knowledge level of the subject was **above or far above average**.





# Retiree Support Initiatives



- Retiree Resource Page
- Educational Workshops
  - ✓ Financial Preparedness
  - ✓ Fraud Prevention
- Retiree Volunteer Expo

# Stakeholder Outreach

We continue to increase stakeholder engagement by keeping our participating employers and labor groups up to speed on top member resources.

We host periodic seminars for Teamsters and SEBA. We also helped Local 935 create a retiree resource webpage.



# Inaugural Employer Forum



Our first Employer Forum was held on **February 5** at SBCERA.

This event informed, educated, and empowered attendees in their role as a participating employer.

# Responsible Advocacy

Our **Legislative Principles and Guidelines** continue to 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.

# SBCERA TVs – Internal Communication



We launched our **SBCERA TVs** in all our team breakrooms.

They feature latest news related to SBCERA, HR announcements, upcoming internal events, professional achievements, and personal announcements.

# Looking Ahead

# Employee Onboarding & Engagement

The Communications and Human Resources teams have been working on our **new employee onboarding video project** designed to help new team members feel informed, confident, and connected as they begin their journey at SBCERA.


These videos will introduce them to who we are as an organization, the important services we provide to our members, how we strategically invest for the long term, and the benefits they have access to.



# Expanding Video Library

- Quick Tip Videos
- We Are SBCERA Campaign
- Instructional Videos
- EmployerDirect Tutorials

[QUICK TIPS](#)[WE ARE SBCERA](#)[SEMINARS](#)[NEW MEMBERS](#)[ALL](#)



Quick Tip

**Factors Used to Calculate Retirement**


SBCERA

### Factors Used to Calculate Retirement

When you retire, your benefit is based on four factors.

In this Quick Tip video, we're going to talk about the factors used to calculate your retirement benefit.

[Planning Your Service Retirement](#)



Quick Tip

**Reciprocity**


SBCERA

### Reciprocity

If you were previously a member of another California public retirement system, or at any point in the future decide to work for another California public sector employer, you may want to consider reciprocity.

In this Quick Tip video, we're going to be talking about reciprocity.

[Reciprocity](#)



Quick Tip

**Special Durable Power of Attorney**

SBCERA

### Special Durable Power of Attorney

Who will make critical decisions related to your retirement account if you're suddenly unable to do so yourself?

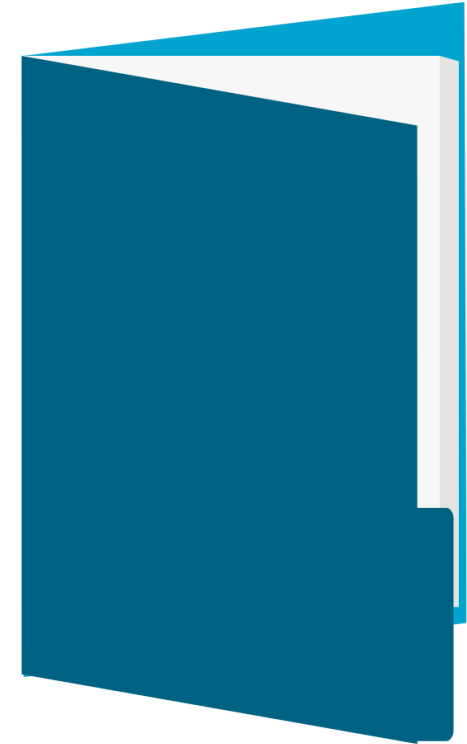
In this Quick Tip video, we're going to talk about the Special Durable Power of Attorney form, and why it's important that you have one in place.

[Forms](#)

# New Member Welcome Package

Our team is working closely with Member Services to launch a new member welcome package.

It's designed to ensure confirmation of accurate enrollment information and educate members about SBCERA and their retirement benefits.



# Proactive Targeted Campaigns

We will be prioritizing proactive personalized member outreach campaigns.

Using data-driven insights, we can send call-to-action messages that will help members in the long run.



# 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.



# Communications & Engagement Metrics

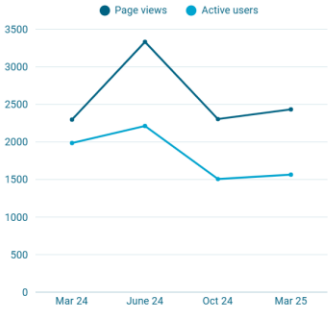
Effective communication and engagement are key to fostering strong relationships with our members and stakeholders. This snapshot provides an overview of key performance metrics that assess the reach, impact, and effectiveness of our communication efforts. By analyzing data such as email performance, website traffic, and social media engagement, we can refine our strategies to enhance transparency, increase participation, and ensure our messaging resonates with our audience.

## Website Engagement

**Page Views** indicate the total times a webpage is loaded, counting every visit. **Active Users** are those who engage with our website at least 10 seconds or more, triggering an event.

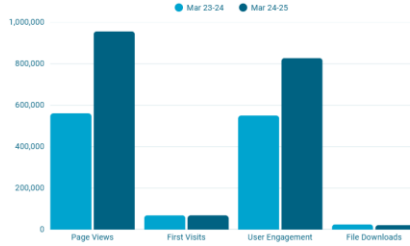
### Top visited pages

|                                  | Page Views | Active Users |
|----------------------------------|------------|--------------|
| Planning Your Service Retirement | 10,029     | 5,646        |
| Members                          | 6,783      | 4,484        |
| Benefit Payment Dates            | 5,675      | 3,625        |
| Your Contributions               | 5,535      | 3,625        |
| Forms                            | 4,059      | 1,835        |

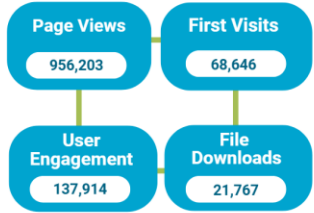


### Top Searches | Event Count

**Events Count** tracks specific interactions, such as button clicks, video plays, form submissions, downloads, or other user actions.



AS OF MARCH 2024 - MARCH 2025



## Email Campaigns Mailchimp

Total Subscribers  
**45,169** ↑ 13.3%



### Electronic Newsletters

According to the industry average, the average open rate for electronic newsletter is **40.55%** and the average click rate is **4.58%**.

The **Journey to Retirement** newsletter has an average open rate of **60.0%** and a click rate of **6.7%**.

The **Life After Retirement** newsletter has an average open rate of **56.5%** and a click rate of **4.8%**.

↑ Since January 2023, the open rate for *Journey to Retirement* has increased by **64%**, while the click rate has risen by **8.2%**.

## We Are SBCERA Campaign

- **26,481** Total Impressions
- **17,752** Total Views
- **105 Hours** Total Watch Time  
*YouTube Only*

AS OF MARCH 2025



## Social Media Facebook, LinkedIn, X, YouTube



AS OF MARCH 2024 - MARCH 2025

SBCERA publishes information **14 times more often** than other government agencies.

Source: Facebook Meta Business

## 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

2024 – EPIC Award

2025 – Award of Distinction

### PRSA

2024 – Polaris Award

2025 – Polaris Award (Pending)

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