



Strategic Communications Plan

Update April 2022

Brand Refresh

Our Brand Refresh has created greater **cohesion** and **consistency** in SBCERA's communications, leading to a **stronger organizational identity** and brand.

Our Brand Refresh honors our **past**, celebrates our **present**, and looks toward our **future**.

Exhibit A: Page 4



San Bernardino County Employees'
Retirement Association

Logo



Service • Accountability • Security

Logo with Tagline

Milestone Postcards



Retirement Consultation Guide



Use this resource as you plan your service retirement.



Exhibit A: Page 6

Contents

Introduction

Planning your service retirement

1. Retirement Options

01 Before Retirement

A list of important tasks to complete prior to retiring

- | | |
|--|---------------------------------------|
| 1. Create a mySBCERA Account | 10. Review Leave Balances |
| 2. Attend a Seminar or Webinar | 11. Finalize Service Credit Purchases |
| 3. Service Purchase Options | 12. Social Security |
| 4. Reciprocity | 13. Deferred Compensation |
| 5. Provide Verification Documents | 14. Health Insurance Options |
| 6. Provide Divorce Documents | 15. Inform your Employer |
| 7. Choose a Retirement Effective Date | |
| 8. Request a Service Retirement Packet | |
| 9. Final Average Compensation | |

02 At Retirement

With SBCERA as a resource, decisions to make at retirement

- | | |
|---|----------------------------------|
| 1. Contact SBCERA 60 Days Prior to Retirement | 3. Complete and Return Paperwork |
| 2. Schedule an Appointment with a Retirement Specialist | 4. Other Considerations |

03 After Retirement

A few items to keep in mind as you enjoy retirement

- | | |
|----------------------------------|-------------------------------|
| 1. What Happens Next | 4. Open Enrollment |
| 2. Keep Your Information Updated | 5. Post-Retirement Employment |
| 3. mySBCERA | |



“My Retirement Specialist provided me with all the knowledge I needed to make an informed decision.”

NAN REPORT

The San Bernardino County Employees' Retirement Association (SBCERA) administers the SBCERA pension plan – a cost-sharing multiple-employer defined benefit pension plan (the "Plan"). As management of SBCERA, we offer readers of SBCERA's financial statements this Popular Annual Financial Report (PAFR). The PAFR is derived from information contained in SBCERA's Comprehensive Annual Financial Report (CAFR) for the year ended June 30, 2019, but does not conform to detailed financial accounting principles. The PAFR does not replace the CAFR, so readers are encouraged to consult the information presented in this report in conjunction with the entire CAFR, which is available at www.sbcera.org.

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MEMBERSHIP		As of June 30, 2019	
ACTIVE	19,190	DEFERRED	6,726
GENERAL	2,633	RETIREES	11,481
SAFETY	21,823	BENEFICIARIES	1,763
		SERVICE RETIREMENT	9,861
		DISABILITY RETIREMENT	1,620
		TOTAL MEMBERS	41,793

BENEFITS
FOR THE YEAR ENDED JUNE

BENEFITS PAID

REFUNDS PAID
\$12,123
(AMOUNTS IN THOUSANDS)

BENEFITS FOR THE YEAR ENDED JUNE 30, 2000		
YEARS OF CREDITED SERVICE	AVERAGE MONTHLY FINAL AVERAGE SALARY	AVERAGE MONTHLY BENEFIT
0-5	\$5,400	\$ 914
5-10	\$4,814	\$1,344
10-15	\$4,301	\$2,011
15-20	\$5,254	\$2,838
20-25	\$5,880	\$3,464
25-30	\$6,710	\$4,291
30-35	\$7,493	\$5,118

[illegible]

SCBCA AWARDED FOR 2018 POP

The Government Finance Officers Association of the United States (GFAO) has announced that the Santa Clara County Association of Public Employees (SCAPE) has been awarded the 2018 POP (Public Opinion Poll) award for its outstanding achievement in public opinion polling. The award is presented annually to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling.

An Award for Outstanding Achievement in Public Opinion Polling

The award is presented annually to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling.

SCBCA was also awarded a Certificate of Achievement for Excellence in Financial Reporting

The award is presented annually to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling. The award is presented to the organization that has demonstrated the highest level of achievement in public opinion polling.

Fiduciary alternate members (which include two members elected one of San Bernardino Treasurer (Council members serve three-year terms, with re-election possible) and one appointed to the Board meets monthly. Members are reimbursed for attendance), and all members are reimbursed for section 5152. SBCEA's Chief Executive Officer is appointed by the Board.

James Beauford
Board Chair
Administrative Committee
Appointed by Board of Supervisors

Michael Kamel
Audit Committee
Appointed by Board of Supervisors

John Johnson
Appointed
Ex-Officio

Steve Flynn
Administrative Committee
Appointed by Board of Supervisors

Wendy Williams
Administrative Committee
Audit Committee
Elected by General Members

7

\$10.6 BILLION
TOTAL NET POSITION



80% FUNDED (AVA)

42,000
ERS

\$3,679 MONTHLY BENEFIT

INVESTMENTS

The Board of Investment Management firm manages BCRRA's assets. The investment staff responsible for the establishment of investment objectives, strategies and the implementation of investments authorized by the Board consists of:

- Investment Manager - oversees all investments.
- Investment Strategist - develops investment strategy.
- Policy and Guidelines Committee - sets policy and guidelines.
- Performance Officers - performance objectives, investment targets.

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ASSET ALLOCATION
AS OF JUNE 30, 2019

Year	Growth of Plan Assets (%)
2010	22.46%
2011	9.91%
2012	17.95%
2013	11.91%
2014	4.46%
2015	11.87%
2016	13.25%
2017	8.26%
2018	6.81%
2019	8.81%



INVESTMENTS

17.1% 17.1% 6.4% 4.4% 1.6% 1.6% 4.4% 4.4% 4.4%

2011 2012 2013 2014 2015 2016 2017 2018 2019

FAIR VALUE GROWTH OF PLAN ASSETS HELD FOR INVESTMENTS
10 YEARS ENDED JUNE 30, 2019 (AMOUNTS IN MILLIONS)

See the "Other" category of the Fair Value Hierarchy (Funds, Investment Funds)

\$14,027
\$14,028
\$9,373
\$9,196
\$8,472
\$8,361



Website Redesign

Our new website includes a **new design, core functionality, and enhanced accessibility** for those we serve.

This website supports the needs of all our members and stakeholders. We're proud to offer an enhanced user-experience, easier navigation, and fast access to information.

Exhibit A: Page 10

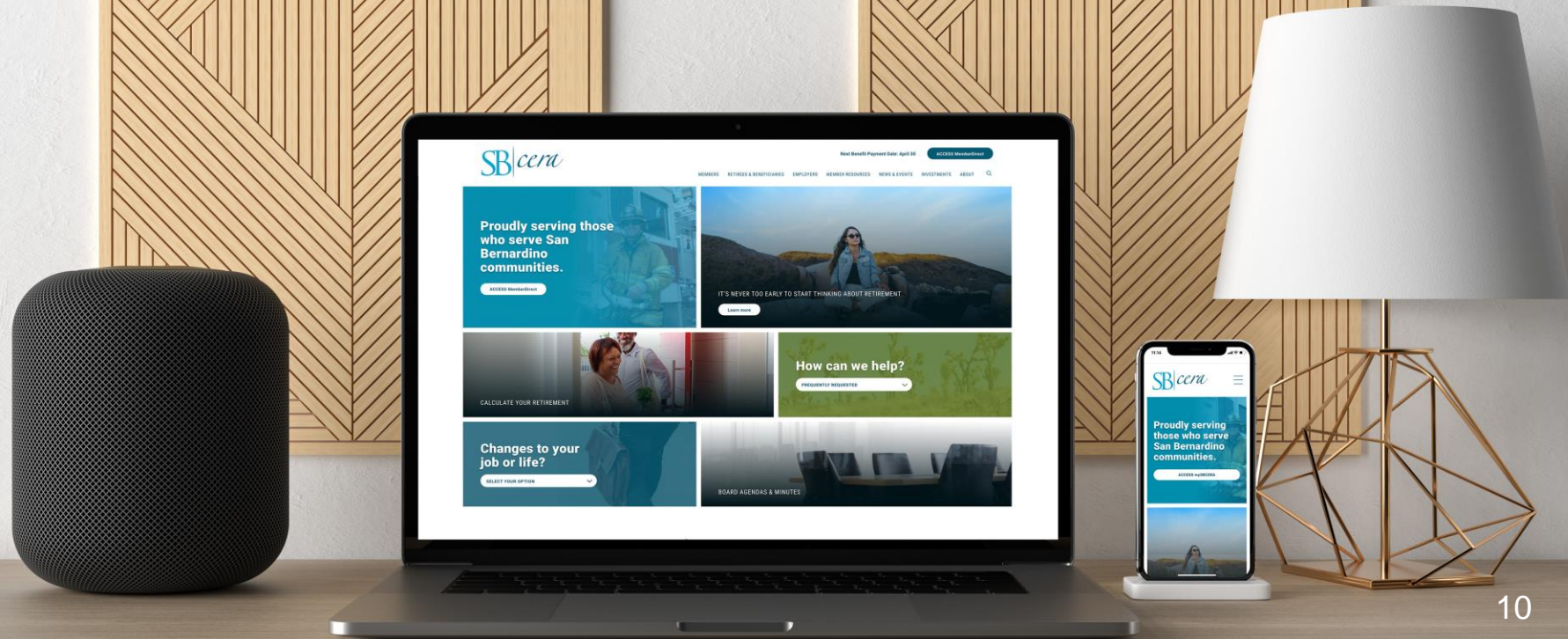
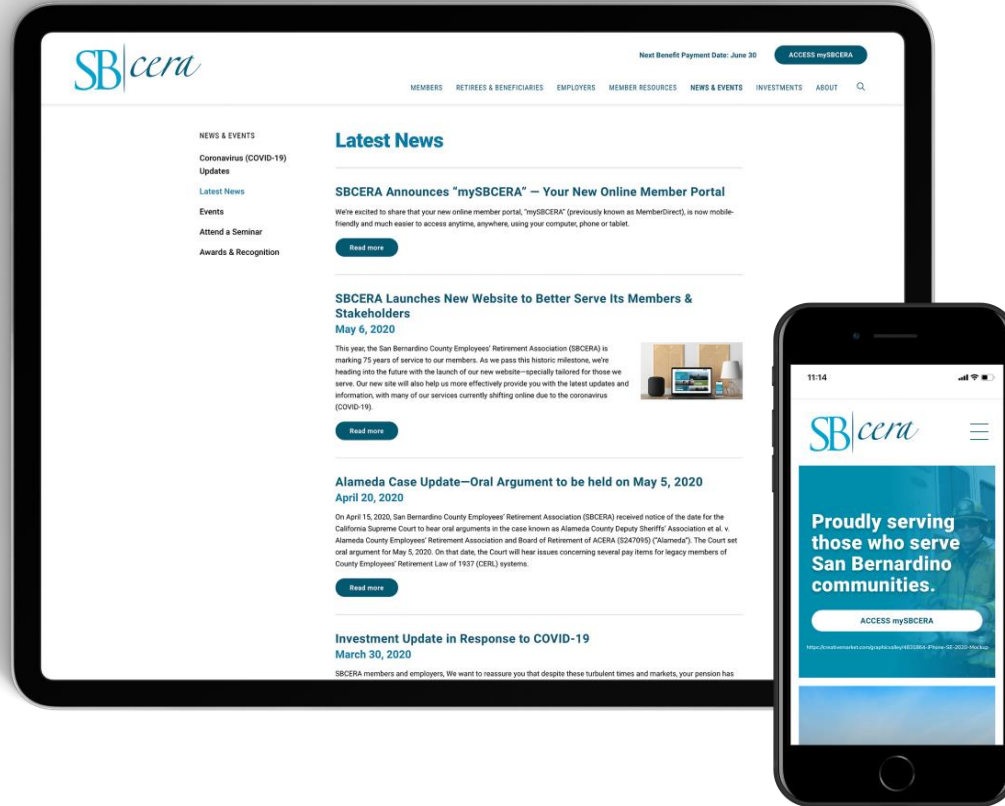


Exhibit A: Page 11



Since the launch, we've already seen a **43% increase** in website visits. Pageviews have increased by **164%**.

Beyond this, visitors are spending **32% more time on the site** to find the answers they need without ever having to pick up the phone or send an email.

Member Outreach & Education

Online Webinars

In 2021, we had **1,682 members** attend our online webinars, growing attendance by 47% over the previous year.

92% said information presented is extremely useful.

90% said they are extremely likely to recommend the webinar to a co-worker.

Periodic Electronic Newsletter

Two separate and focused campaigns

In the 2019 Member Engagement Survey, 72% of our members shared they prefer to be informed about SBCERA news through e-mails.

In the 2021 Member Engagement Survey, 81% of our members shared they prefer to be informed about SBCERA news through e-mails.

Journey to Retirement

Journey to Retirement

Member News | February 2021

We're excited to share our first issue of *Journey to Retirement* with you!

These new periodic electronic newsletters are designed with you, our member, in mind. They are filled with information on our latest news, highlights, and educational resources to help support your retirement planning. We want this newsletter to be valuable for you so please share any feedback and suggestions with us at communications@sbcera.org.



Attend a Pre-Retirement or Mid-Career Webinar

Planning your retirement can be difficult, especially with all the choices you have to make and factors to consider. Our online webinars are designed to provide you with the information you need so you can feel confident in your retirement decisions.

Note: Mid-Career Webinars are generally suggested for members who are within 10 years of retirement, and Pre-Retirement Webinars are suggested for members within 5 years of retirement.

[Register Today](#)



This Year's Retiree Cost-of-Living Adjustment (COLA) Will Be 2.0%

Members who retire on or before April 1, 2021, will receive the 2.0% COLA, and the increase will automatically be included in benefit payments beginning April 30, 2021. The SBCERA Board of Retirement approved the COLA for Retirees and Beneficiaries at its Board on February 4, 2021.

[Learn more](#)

Life After Retirement

Life After Retirement

Member News | February 2021

We're excited to share our first issue of *Life After Retirement* with you!

These new periodic electronic newsletters are designed with you, our member, in mind. They are filled with information on our latest news, highlights, and educational resources to help support you in your life after retirement. We want this newsletter to be valuable for you so please share any feedback and suggestions with us at communications@sbcera.org.



This Year's Cost-of-Living Adjustment Will Be 2.0%

This year's 2.0% Cost-of-Living Adjustment (COLA) will be effective April 1, 2021 and you can expect to see it reflected in your April 30, 2021 benefit payment. The SBCERA Board of Retirement approved the COLA for Retirees and Beneficiaries at its Board meeting on February 4, 2021. You can find more information on our website at www.SBCERA.org/COLA.

[Learn more](#)



2020 Tax Form 1099-Rs Mailed and Available to View

We mailed your 2020 1099-R tax form in late January and it's also available in [mySBCERA](#). More information and answers to frequently asked questions can be viewed on our website at www.SBCERA.org/1099R.

For detailed information and answers to frequently asked questions about 1099-Rs, view our [1099-R FAQ](#).

[Learn more](#)

Future Goals & Objectives

1. **Multimedia:** Expand multimedia resources for member education and outreach by creating quick tip videos focused on frequently asked questions and popular topics.
2. **Stakeholder Relations:** Evaluate our government and stakeholder relations efforts with a renewed focus on legislation and policy. Create an Employer Handbook that will serve as a helpful guide to participating employers and host a Plan Sponsor event designed to empower our employers through education.
3. **Updated Strategic Communications Plan:** We will update the Strategic Communications Plan once SBCERA's new Triennial Strategic Plan is implemented.

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San Bernardino County Employees'
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