SB cera
San Bernardino County Employees' Retirement Association

Triennial Strategic Plan

Fiscal Years 2023, 2024, and 2025

Board of Retirement

Neal Waner, Chair – Appointed Member
Marc Bracco, Vice Chair – Elected Member (Safety)
Jean-Rene Basle – Appointed Member
Louis Fiorino – Elected Member (General)
Michael Kennedy – Appointed Member
Ensen Mason – Auditor-Controller/Treasure/Tax Collector (Ex-Officio Member)
Janice Rutherford – Appointed Member
Dawn Stafford – Elected Member (Retired)
Vere Williams – Elected Member (General)

Alternate Members:

Harry Hatch – Elected Alternate (Retired)
John Johnson – Alternate Ex Officio Member
Jared Newcomer – Elected Alternate (Safety)

Adopted:

Mission Statement

It is the mission of the San Bernardino County Employees' Retirement Association (SBCERA) to provide the members and their beneficiaries with those retirement and related benefits and services which they have earned and which are commensurate with their years of service and compensation.

It is the responsibility of those charged with administration of SBCERA to:

- Effectively collect contributions to fund liabilities incurred;
- Diversify the investments of the system so as to minimize the risk of loss and to maximize the rate of return;
- Administer the benefits impartially, fairly and in accordance with the applicable law;
- Deliver service to the membership in an accurate, courteous, prompt, professional and cost-efficient manner;
- Appropriate set employer and member contributions in accordance with responsible funding practices; and
- Strategically plan for the future.

SBCERA Values

Integrity – We will be honest, ethical, respectful and trustworthy in all aspects in serving our members, employees, and our community.

Accountability & Transparency – We will ensure that the decisions we make and how we conduct business is clearly communicated and understood. We will be accountable for our conduct in all aspects of our service.

Commitment – We will approach our work enthusiastically.

Effectiveness – We will be results-oriented in a cost-effective manner, capitalizing on our strengths and capabilities.

Professional Excellence – We will be skilled, confident and capable.

Collaboration – We will work together as a team and with key stakeholders.

Strategic Pillars



With a clearly defined mission and set of shared values, SBCERA is driven to provide service and a focus on the following co-equal pillars:

- Operational Excellence and Efficiency
- Superior Service Experience
- Quality Employer and Workplace
- Prudent Fiscal Management
- Effective Communications

Each of these pillars have a set of Strategic Priorities, which are elaborated below.

Operational Excellence and Efficiency

Strategic Priority	Comments
Process re-engineering and work assignment realignments	• Modernize workflows • Measurably improve service times
Documented procedures across all areas	• Improve consistency • Mitigate risk • Reduce training costs • Improve internal controls
Programmatic evaluation of cost-effectiveness of and controls for benefit services contracted with the County of San Bernardino	• Recognize independence of SBCERA • Improve ability to serve employees
Programmatic evaluation of all other existing operational contracts, vendor relationships, and key terms	• Improve service levels • Identify cost savings
Pension Administration System Refresh	• Keep existing multi-year project on track to conclude existing project scope through 2023

Strategic Priority	Comments
	• Expand scope to include additional training and change management services
Enterprise content management solution	• Select and implement a content management solution
Investment document integration portal	• Automate the transfer and storage of key materials such as compliance documents, investment proposals, performance reports, capital statements, and financials
Contract management solution	• Select and implement a contract management solution

Superior Service Experience

Strategic Priority	Comments
Performance metrics and reporting	• Improve accountability to membership
Process re-engineering and work assignment realignments	• *See Operational Excellence and Efficiency*
Industry-leading technologies	• Self-service capabilities • Secure communications • Digital signatures (DocuSign) • Personally-identifiable information ("PII") compliance
Case management/tracking solution	• Provide improved visibility into retirement needs of members • Improve timeliness of service • Aid in assuring service is delivered if there is a personnel disruption
SBCERA University	• Explore a strengthened partnership with Voya and other defined contribution plan record keepers, and develop a comprehensive plan to improve financial education for

Strategic Priority	Comments
	our members as they approach retirement • Focus on employer human resource, payroll, finance, and executive staff
Revamped member education	• Focus on creating a library of "quick tip" videos
Enhanced pre-retirement member education and post-retirement support	• Explore a strengthened partnership with Voya and other defined contribution plan record keepers to improve financial education around retirement • Explore a partnership to support newly retired members as they transition to life after retirement

Quality Employer and Workplace

Strategic Priority	Comments
Post-pandemic team building and employee engagement	• Create a happier, more engaged team • Improve accountability to membership
Develop and deliver training	• Management/Supervisory training • Staff enrichment training, to include both hard and soft skills • Board training, as needed/desired
Space utilization/expansion	• Consolidate call center staff so they can work together; relocate Information Services
Employee onboarding	• Expand curriculum and experience for employee orientation and onboarding

Strategic Priority	Comments
Internship program	• Partner with Hansen & Bridgett for legal internship training • Partner with CSUSB to offer paid internships

Prudent Fiscal Management

Strategic Priority	Comments
Fully implement the *Alameda* Supreme Court decision	• Conclude the refund process for those eligible, coordinated with defined contribution plan providers to provide tax deferred options to eligible members • File voluntary correction plan with the Internal Revenue Service • Conclude administrative appeal hearings
Engage a vocational specialist to advise the Board on disability matters involving gainful employment	• On a pilot basis, engage a vocational specialist to provide counsel to the Board on issues associated with whether a member applying for a disability retirement is able to be gainfully employed
Cybersecurity	• Harden defenses through hardware, software, and employee training
Standardize cybersecurity language in contracts	• Ensure consistent standards in applying cybersecurity requirements and limitations
Investment contract review	• Programmatically review all investment contracts to ensure consistency and modernity of business terms

Effective Communications

Strategic Priority	Comments
mySBCERA enhancements to promote new self-service opportunities	• Through the PG refresh project and beyond, expand opportunities for members to communicate and transact business with SBCERA
Engage in responsible advocacy	• Focus on issues affecting SBCERA administration and/or investments • Engage in advocacy directly and through associations such as SACRS, CALAPRS, and CSDA
Standardized employer data transfer platform	• Empower employers to certify member data • Ensure compliance • Reduce SBCERA processing times, costs, and overall risk
Internal communications plan	• Ensure intentional, timely, and consistent communication to all staff