



Triennial Strategic Plan for the Fiscal Years 2020, 2021 & 2022 Update as of March 2021

Note: Updates are shown in **BLUE** text

Strategic Plan is located at <https://www.sbcera.org/strategic-plan>

Strategic Pillar	Ref. No.	Priority	Goals	Status	Executive Sponsors	Target Completion
Operational Excellence & Efficiency	1-1	Organizational chart alignment and revisions	Balance skills, capabilities and oversight	<p>FY 2020 budget incorporates additional positions, expected realignments.</p> <p>September 2019 Update: Realignment of Accounting Technician team to Fiscal has been completed. New positions approved through the FY 2019-20 budget have been filled, are in the process of being filled, or are commencing shortly. A number of internal promotions have occurred, creating additional recruitment opportunities behind them. The HR team has been busy, and continues its efforts.</p> <p>December 2019 Update: The organizational chart re-alignments have been completed; no additional changes are anticipated at this time.</p>	Cherney	PREVIOUSLY COMPLETED December 2019
Operational Excellence & Efficiency	1-2	Process re-engineering and work assignment realignments	Modernize workflows; measurably improve service times; provide foundation for succession planning and fair compensation	<p>May 2020 Update: The Pension Gold refresh project was moved to a separate Strategic Priority (see 1-7).</p> <p>March 2021 Update: See 1-7.</p>	Michael Bishop McInerney	December 2021
Operational Excellence & Efficiency	1-3	Documented procedures across all areas	Improve consistency; mitigate risk; reduce training costs; improve internal controls;	May 2020 Update: Substantial progress has been made in documenting procedures in Fiscal and Disabilities. The Pension Gold refresh	Hannah Bishop McInerney	December 2021

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			foundation for future SOC-1 report	<p>project is expected to accelerate the documentation of current and future processes, as the basis for process improvements.</p> <p>October 2020 Update: The Pension Gold refresh project, being well underway, has advanced the documentation of a few dozen process areas, including identifying areas for changes in process and procedure, as well as potential changes the underlying technology. The project remains on track and is further discussed in 1-7 below.</p> <p>March 2021 Update: As noted in October, this is mainly driven through the Pension Gold refresh project, which is now in Phase 2 (implementation).</p>		
Operational Excellence & Efficiency	1-4	Programmatic evaluation of cost-effectiveness of and controls for outside services contracted with the County of San Bernardino	Improve service levels; eliminate redundancy; recognize independence of SBCERA	May 2020 Update: Staff has had a number of discussions with the County regarding potential changes. Staff is in the process of contracting with Pitney Bowes to move mail services in-house at significant cost and time savings. In addition, staff has evaluated a variety of payroll systems, and has narrowed down to two systems for potential implementation before the end of the calendar year. The internet cutover has been completed, which will provide a	Cherney Michael McInerney Barnier	December 2020



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				<p>foundation to migrate to Office 365 and away from County-hosted email. The risk management/insurance RFP yielded two finalists which are providing quotes and being interviewed the week of May 4.</p> <p>October 2020 Update: The new Pitney Bowes equipment has been installed and staff anticipates completing the cutover away from County mail services within the next month. SBCERA IS has met with the County Information Services Department and has mapped out a plan for the migration away from County-hosted email. Staff is in the process of negotiating an agreement for the implementation of Office 365, and preparing a schedule for the cutover. All staff have been converted to SBCERA's VPN. The two payroll system finalists are in the final stages of being vetted; staff believes the new system can be implemented under the CEO's purchasing authority. Finally, staff is meeting with County management regarding the legacy Cowcap cost allocation, as SBCERA will no longer be receiving the services for which we are currently paying.</p>		



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				March 2021 Update: Staff has completed the cutover of mail service, payroll service, and email and is now handling those independently from the County. The County has ceased the legacy COWCAP cost allocations. Staff is in the process of working with County ATC to close out our remaining funds on deposit with the County treasury pool. This move assists SBCERA by improving efficiency, lowering our costs, and improving our internal controls. (Recall that we had received an audit comment from Brown Armstrong that the failure to approve or have an accounting of funds taken from our accounts with the County was an internal control weakness.)		
Operational Excellence & Efficiency	1-5	Programmatic evaluation of all other existing operational contracts, vendor relationships and key terms	Improve service levels; identify cost savings	<p>May 2020 Update: As contracts continue to come up for renewal or specific issues are identified, staff is reviewing key terms to identify service needs, costs and need for RFPs. Staff negotiated updated terms with State Street to attain higher yields on cash and reduce operational inefficiencies. Staff also achieved improved pricing on its printing services by selecting a new vendor.</p> <p>October 2020 Update: No new contracts were up for renewal since the</p>	All	Ongoing



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				<p>last update was provided. Staff will continue to evaluate operational contracts as they come up for renewal.</p> <p>March 2021 Update: Staff plans to issue an RFP for investment consulting services in the first week of March, with the intent to work with the Investment Committee and the Board to make a selection by July 2021. The existing agreement with NEPC expires in December 2021.</p>		
Operational Excellence & Efficiency	1-6	Modernize and streamline technologies	Configure, not customize; improve workflows; support total process evaluation and improvement; case management system; records integrity; document integration; migration to cloud; remote access tools	<p>May 2020 Update: Staff has made substantial progress on advancing the projects that were budgeted for FY 2019-20. Most notable are the foundational improvements to SBCERA's internet connectivity, including moving to a new VPN and connection that are independent of the County. This is substantially improved our speed, which has been important as we move our team to working virtually during the COVID-19 pandemic. The team will next move forward with the Office 365 implementation, and move email off the County's servers.</p> <p>October 2020 Update: Remote access tools and configurations continue to be refined so as to support the COVID-19</p>	Michael	December 2021



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				<p>office closure and staff working remotely. Staff is currently evaluating whether ProLaw, which is currently used by the Legal Services team, and will be upgraded to a newer version this year, may be an option to be used as a case management system for the Disability Unit. Currently, files for that unit are stored in a shared folder, which is not ideal for case tracking and management. In addition, staff is going to explore a contract management system, and plans to release an RFQ/RFP in the Spring of 2021. Lastly, staff is nearing completion of implementing PolicyStat, which will integrate with our public website to provide all SBCERA policies in an easy to search and use format. Other technology modernization projects are identified separately below.</p> <p>March 2021 Update: Office 365 is now live as of February 22, 2021. The ProLaw upgrade is nearing completion and should be completed in March 2021. Staff has completed the implementation of Everbridge for emergency alerts and notifications, and staff will be trained in the coming weeks, while the crisis management elements are on hold pending the</p>		

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Strategic Pillar	Ref. No.	Priority	Goals	Status	Executive Sponsors	Target Completion
				completion on the Office 365 and Dialpad projects. The Contract Management RFQ is expected to be released in April 2021. An Enterprise Content Management RFQ/RFP is likely to follow in mid-2021. Finally, the PolicyStat cloud solution has been fully implemented and is available on our website for a complete database of our approved Board policies.		
Operational Excellence & Efficiency	1-7	Pension Gold refresh		Separate Priority as of May 2020: Linea Solutions was selected as the consulting team to assist staff with the Pension Gold refresh project. The Board approved the contract in February; while work was anticipated to commence in earnest in March, the office closure due to COVID-19 has slowed progress. However, Linea and the steering committee have continue to meet virtually at least once a week. With public health orders still in place for "safer at home", we intend to formally kick off the project and continue on a virtual basis as long as needed. Working from home has proven to expose many internal inefficiencies, which will be tackled as part of the project, whether process-related or due to the underlying technology configurations.	Bishop	December 2021- October 2022



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				<p>October 2020 Update: Staff and Linea have continued full steam ahead on the project, and are nearing the completion of Phase 1, at which time the specific areas to be addressed in Phase 2 will be identified. We have identified the software revisions that we believe will be in scope, and have requested the LRS provide us with a fee estimate for professional services. We expect to bring the fee estimate and an overview of the scope of work before the Board within the next few months.</p> <p>March 2021 Update: In December 2020, the Board approved a \$2.2 million contract with LRS to do the phase 2 implementation work on Pension Gold. The project is underway, with the first deliverable, an upgrade to our base system to "catch up" on product enhancements over the last eight years, due in May/June. The next four phases of deliverables include member accounts, employer reporting, general ledger, benefit calculations, upgrades to mySBCERA, and miscellaneous reports, correspondence and workflow. The entire project is projected to be completed in October 2022.</p>		



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Operational Excellence & Efficiency	1-8	Select and implement a new phone system	Improve efficiency in call routing; modernize technology; support business continuity; improve metrics	<p>Separate Priority as of May 2020: The RFP for our phone system replacement is currently being prepared. Staff is previewing some of the systems that are likely candidates for selection, and has received some initial costs for budgeting purposes.</p> <p>October 2020 Update: In September 2020, the Board approved a contract with DialPad for the replacement of our phone system. Contracts are being finalized, and the project is expected to be completed prior to the end of the calendar year. This system will be able to be used to fully serve our members in real-time while working remotely.</p> <p>March 2021 Update: The DialPad system was launched to a pilot group of users primarily in Member Services and Disability units, and has now been launched to the entire staff. This system allows us to answer calls in real-time whether working from the office or working remotely. Also key to the system is the ability to gather metrics on call volumes and ensure staffing levels are appropriate. A first goal is to have a service level in which we answer 80% of incoming calls within 2 minutes (a common call center</p>	Michael Bishop	COMPLETED

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				metric). We are routinely achieving that at this point.		
Operational Excellence & Efficiency	1-9	Implement new accounting systems	Improve reporting and connectivity; eliminate shadow systems; automate accounts payable approvals process; improve reporting	<p>May 2020 Update: Staff will be implementing a trio of solutions (new general ledger, new accounts payable automation and new reporting) that will replace the existing Great Plains, Questica, and manual processes.</p> <p>October 2020 Update: With the new staff Accountants onboard, staff anticipates being able to accelerate the implementation of the new solutions for general ledgers, accounts payable and reporting. Work associated with implementing the <i>Alameda</i> Supreme Court decision has consumed most of the Fiscal Services team's time.</p> <p>March 2021 Update: See 4-1.</p>	McInerny	September 2021
Operational Excellence & Efficiency	1-10	Implement new HR/Payroll system	Improve processing times; gain greater control	<p>May 2020 Update: Staff is in the process of conducting due diligence for two finalists after vetting more than a dozen systems.</p> <p>October 2020 Update: This project was temporarily on hold during the summer, but due diligence has recommenced to select a preferred vendor. This contract is expected to be under the</p>	Barnier	COMPLETED



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				<p>CEO's purchasing authority, but staff will keep the Board informed as progress is made.</p> <p>March 2021 Update: Staff went live on the Isolved by Big Fish Employer Services for the first payroll in January 2021. Minor hiccups with County HR/Emacs have been resolved.</p>		
Operational Excellence & Efficiency	1-11	Select and implement new Enterprise Content Management solution	Improve efficiency; consolidate disparate document management systems; reduce dependence on unwieldy share drives	<p>New for FY 2020-21.</p> <p>October 2020 Update: This project has not yet commenced.</p> <p>March 2021 Update: This project has not yet commenced. An RFQ/RFP is anticipated to be released mid-2021.</p>	Michael	June 2022
Operational Excellence & Efficiency	1-12	Modernize Business Continuity Plans	Improve capabilities to serve members during disruptions	<p>New for FY 2020-21. Notably, staff is already getting a headstart on this by necessity while staff is working from home. There are a number of opportunities staff has identified, which will be helped by the other projects such as the phone system replacement and Pension Gold refresh.</p> <p>October 2020 Update: Staff selected Everbridge to serve for emergency notifications, and an item is on the Board's agenda to expand the</p>	Michael	June 2021



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				<p>implementation contract to include modules for crisis management and business continuity, which will leverage best and leading practices. Plans will be available in the cloud, and have workflow for communications and job design.</p> <p>March 2021 Update: Staff has completed the implementation of Everbridge for emergency alerts and notifications, and staff will be trained in the coming weeks, while the crisis management elements are on hold pending the completion of the Office 365 and Dialpad projects.</p>		
Superior Service Experience	2-1	Performance metrics and reporting	Improve accountability to membership	<p>May 2020 Update: Staff is in the process of identifying its key metrics in Fiscal, Member Services and Disabilities, and as part of the Pension Gold refresh project, is establishing its key performance metrics. Some of those will include frequency and numbers of transactions, processing times, and work accuracy. Some of the desired metrics are difficult to glean from our existing systems, but there may be opportunities through the PG refresh project to make changes that will automate ways to pull metrics. Metrics are important to determine</p>	Bishop Hannah McInerney	December 2020



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				<p>whether we are improving service levels, and to help inform resource needs.</p> <p>October 2020 Update: Through the PensionGold refresh project, staff has identified metrics for all key process areas, and will build the ability to gather those into PensionGold and DialPad. At this point, most available metrics are tracked or queried manually.</p> <p>March 2021 Update: Staff is starting to be able to collect some metrics from the DialPad system on phone calls, and has implemented the contact log in Pension Gold to be able to identify overall volume for inquiries and member communications. This will substantially improve through the Pension Gold refresh project.</p>		
Superior Service Experience	2-2	Member engagement survey	Understand what we're doing well and what we need to improve	<p>May 2020 Update: Results from the membership survey were received and synthesized; staff incorporated this into the Strategic Communications Plan, which has been approved by the Administrative Committee and is being presented to the Board at its meeting on May 7.</p> <p>March 2021 Update: See 5-1.</p>	Cherney Bishop	PREVIOUSLY COMPLETED May 2020



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Superior Service Experience	2-3	Process re-engineering and work assignment realignments	<i>See 1-2 & 1-7</i>	<i>See 1-2 & 1-7</i>	<i>See 1-2 & 1-7</i>	<i>See 1-2 & 1-7</i>
Superior Service Experience	2-4	Implement industry-leading technologies	Self-service capabilities; secure connections; digital signatures; personally-identifiable information ("PII") compliance.	<p>This project will commence once the Pension Gold refresh project is more substantially complete.</p> <p>October 2020 Update: Still on hold at this time.</p> <p>March 2021 Update: Staff plans to pilot the use of DocuSign with the Investment team for digital signatures. If the pilot is successful, staff will broaden this out for use with members on documents that do not require original "wet" signatures.</p>	Michael	December 2021
Quality Employer and Workplace	3-1	Continued efforts on culture alignment and morale	Create a happier, more engaged team; improve accountability to membership	<p>May 2020 Update: Staff continues to work on ways to incorporate SBCERA's core values into our daily "ways of being". This is particularly important as we are not able to physically be together, but find ways to keep the team connected.</p> <p>October 2020 Update: Staff continues to incorporate this across the organization. The Fiscal Services team was featured in the Government Finance Review magazine in</p>	All	Ongoing



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				<p>September, with a focus on empowerment, culture and service excellence. In addition, staff is working to implement an Ethics Hotline to provide a reporting mechanism to report concerns.</p> <p>March 2021 Update: Staff continues to try to stay connected while most are working remotely. The office renovations are complete, and a digital "show and tell" meeting was very well received by staff. The Ethics hotline/reporting portal is in the process of implementation and is expected to be rolled out in the coming months.</p>		
Quality Employer and Workplace	3-2	Realign work assignments	See 1-2	See 1-2	See 1-2	See 1-2
Quality Employer and Workplace	3-3	Develop and deliver training	Management/supervisory training; staff enrichment training - soft and hard skills	<p>May 2020 Update: Training has transitioned to virtual training; HR has provided all of our employees with a list of free resources and is working to expand on-demand training offerings that can expand our teammates' skills. In addition, we will be offering virtual training for required training, such as harassment prevention.</p> <p>October 2020 Update: Individual and group training opportunities continue to be offered as needed.</p>	Barnier	Ongoing

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				March 2021 Update: Individual and group training opportunities continue to be offered as needed. Some is being conducted by our own staff, while some is conducted externally.		
Quality Employer and Workplace	3-4	Space utilization/expansion	Complete renovations of the third floor, breakroom(s), Board dais and kitchen improvements; Evaluate relocation of member services reception and meeting space; Evaluate video/audit Board meeting feeds	<p>May 2020 Update: Construction is ongoing at the office on the first floor, although work in SBCERA's suites has slowed due to the unavailability of inspectors from the City of San Bernardino.</p> <p>October 2020 Update: First floor construction is complete, second floor common areas are underway, and the third floor renovations are nearing completion, with paint and carpet almost done.</p> <p>March 2021 Update: All building construction is complete. A final project accounting will be delivered to the Board as soon as the final construction invoices are received from the contractor.</p>	Michael	September 2020
Quality Employer and Workplace	3-5	Implement a cross-training initiative	Increase staff understanding of SBCERA; create promotional	<p>May 2020 Update: On hold pending substantial completion of Item 1-2 above.</p> <p>October 2020 Update: Same.</p>	Cherney Barnier	June 2022



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			opportunities; improve service levels	March 2021 Update: On hold while most staff continues working remotely.		
Prudent Fiscal Management	4-1	Improve budgeting transparency and reporting transparency	Improve accountability to membership	<p>May 2020 Update: Staff is proposing to acquire licensing for Workiva, which is a solution to integrate data and automate financial reporting and compliance. Currently, data from disparate sources is entirely manually connected using Excel spreadsheets. The implementation of an automation solution will connect data from disparate systems, with continuous connections to the source data. Automating these manual tasks will reduce the potential for errors, improve speed of work and reporting, and reduce inefficiencies. This proposal was reviewed by the Administrative Committee in April and the committee recommends the Board's approval on May 7.</p> <p>October 2020 Update: In May, the Board approved the procurement of Workiva, and staff is working to implement.</p> <p>March 2021 Update: Workiva has been fully implemented for use with the investment reconciliations. Staff converted the former Excel worksheets</p>	McInerny	September 2020



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				into Workiva, which allows for better file sharing with our auditors for the financial statement audits and will roll up to several schedules in the CAFR without additional data entry. We look forward to begin using Workiva for reporting with the 2021 CAFR and then the following year's budget book. The conversion to our new general ledger software, Enterprise, is moving along as scheduled. We have been running our new and old system parallel since July 2020. This method of running parallel has proven quite useful as we update our procedures and validate the new system.		
Prudent Fiscal Management	4-2	Improve travel and expense reporting transparency	Modernize forms of reporting; streamline Forms 700/801 FPPC reporting accountability	<p>New trustee travel and expense policy approved by the Board in April 2019; staff policy on agenda for May 2019 consideration; gifts policy principles will be agendized to make recommendations and seek Board direction.</p> <p>September 2019 Update: The first quarterly education-related travel expense report is on the Board's agenda on September 5, 2019. In addition, the Board approved its new Gift of Food and Drink Policy, with a revamped framework for accountability and reporting. Staff has developed</p>	Cherney Hannah McInerny	PREVIOUSLY COMPLETED December 2019



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				<p>new internal tracking procedures and processes for "gifts to the system" pursuant to the Board's policy. Staff is in the process of posting the Form 700s for the Trustees as requested.</p> <p>December 2019 Update: A new "Transparency and Reporting" section was added to sbcera.org, which includes the Form 700 filings for 2018, as well as the annual reports on education and training.</p>		
Prudent Fiscal Management	4-3	Unwind Gold Coast offshore platform	Reduce costs and administrative overhead; eliminate unnecessary complexity	<p>May 2020 Update: Substantially completed pending conclusion of the final audit.</p> <p>October 2020 Update: The audit required to finalize the Kneiff Tower liquidation was completed, and all remaining items have been wrapped up.</p>	Pierce	COMPLETED
Prudent Fiscal Management	4-4	Implement improved investment portfolio reporting	Improve reporting transparency; Reduce costs and administrative overhead	New priority as of May 2020: Staff is working with State Street to improve transparency capture for all commingled investments throughout the SBCERA portfolio and aggregation with the expanded custodied assets to provide a comprehensive exposure data set. State Street will source all underlying external manager exposure data directly from managers on a	Pierce	December 2020



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				<p>monthly basis through our Multi-Asset Risk platform. This data will be normalized, cleansed, and aggregated with the existing accounting book of record to provide a comprehensive view of exposure across the portfolio. Services will also include risk analytics calculations, stress test and scenario analysis capabilities, and reporting using the total SBCERA portfolio exposure data. Enhanced data management and performance capabilities includes the ability to provide notionalized asset mix and notionalized performance reporting inclusive of SBCERA's overlay portfolio. Through this process State Street will also convert SBCERA's performance reporting to a daily indicative model to enhance methodologies and frequency of reporting.</p> <p>October 2020 Update: The implementation is in progress, and we hope to complete the first wave by the end of the calendar year. An update was provided to staff and Board members during the State Street due diligence meeting in September.</p> <p>March 2021 Update: The Solovis platform is now live, and staff and</p>		

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				NEPC are working to incorporate that into the monthly investment reporting to the Board. The platform allows staff to have daily insights into portfolio performance, although there can be a few days' delay in accurate numbers. The team is working with Solovis and State Street to continue to improve the capabilities and eliminate manual processes.		
Prudent Fiscal Management	NEW 4-5	Implementation of Alameda Supreme Court decision	Implement direction of the Supreme Court and the SBCERA Board regarding disallowed pay items; process corrective distributions as needed	<p>NEW PRIORITY.</p> <p>October 2020 Update: Approximately 500 current retirees will receive information on their benefit recalculations prior to the end of September. Staff is communicating with various employers on pay codes for which they should no longer collect and pay contributions, and has made requests for additional information on pay items such as canine pay and items for flexible benefits that may or may not be paid in cash. A streamlined appeals process is proposed for the Board's October agenda. Staff is evaluating data for purposes of calculating refunds for the items identified as Alameda exclusions.</p> <p>March 2021 Update: A closed session briefing for the Board is scheduled for</p>	Cherney McInerney Hannah Bishop	June 2021



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				the March 4, 2021 Board meeting. Separately, the canine pay remains the only open item under consideration for its potential inclusion/exclusion as compensation earnable. The Ad Hoc committee has met once, and staff is currently awaiting additional information from the County and the Sheriff's Department to bring back to the Ad Hoc.		
Effective Communications	5-1	Programmatic and engaged employer and other stakeholder communications	Implement training programs and outreach; improve audit/compliance	<p>May 2020 Update: Staff has completed a Strategic Communications Plan which was approved by the Administrative Committee and is on the Board's May 7 agenda. The plan provides a comprehensive approach to all stakeholder communications.</p> <p>October 2020 Update: Staff is implementing the key provisions of the plan.</p> <p>March 2021 Update: Staff has accomplished several goals and objectives outlined in the Strategic Communications Plan, which was created in May 2020. A few of these include the launch of our new website, our brand refresh, the launch of mySBCERA, the completion of our first employer survey, and the creation of branded digital assets such as our</p>	Cherney Bishop	PLAN COMPLETED; Ongoing implementation



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				social media style guide and other templates. We have also expanded our education program – shifting all in-person seminars to online webinars and growing attendance by 40% from the year prior. Staff is on track to implement the full plan on schedule by the end of 2022. In the Customer Service survey, 72% of members shared they prefer to be informed through emails. Staff is currently working on expanding our eCorrespondence efforts by creating our first eNewsletter. We're designing these periodic eNewsletters with our members in mind. They will include bite-sized information on our latest news, highlights, and educational resources to help support our active members on their journey to retirement and our retirees in their life after retirement.		
Effective Communications	5-2	Systematic review of all SBCERA communications	Promote clarity and consistency, correctness, compliance and messaging	May 2020 Update: See Item 5-1 above.	Cherney Bishop	See Item 5-1
Effective Communications	5-3	Website redesign	Improve look, feel and functionality; enable self-service options	May 2020 Update: The new sbcera.org site will launch publicly on May 6. Later in May, the new "mySBCERA" (rebranded from "Member Direct") will	Cherney Bishop	COMPLETED May 2020



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				launch, with improved self-service capabilities.		
Effective Communications	5-4	Engage in responsible advocacy	Focus on issues affecting SBCERA administration and/or investments; achieved directly or through associations such as SACRS, CALAPRS or CSDA	<p>May 2020 Update: Staff (Dave Lantzer) is on the SACRS Legislative Committee and is actively working on the SACRS CERL clean-up bill, which is on hold while the Legislature is not in Sacramento; in addition, staff is interfacing with CSDA to provide expertise on pension related issues.</p> <p>October 2020 Update: AB 2101 (CERL clean-up bill) was passed and is awaiting action by the Governor. A report on 2019-20 legislative session's bills of interest to SBCERA is on the October Board agenda as an informational item.</p> <p>March 2021 Update: AB 2101 was signed by Governor Newsome. A report on the 2020-21 legislative session's bills of interest to SBCERA is included in the Chief Counsel's report for the March 4, 2021 Board meeting.</p>	Cherney Hannah	Ongoing
Effective Communications	5-5	Standardized data transfer platform	Reduce SBCERA processing times and costs; ensures compliance	<p>May 2020 Update: Temporarily on hold as this is considered part of the Pension Gold refresh project.</p> <p>October 2020 Update: Same.</p>	Michael McInerny	December 2021



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				March 2021 Update: Enhancements to the employer reporting modules of Pension Gold appear to be promising to use as a base for a much-improved standardized platform. As the Pension Gold project progresses, we will turn our attention to communications with the employers on standard file and upload formats for reporting payroll and contributions.		