



Strategic Communications Plan

Update April 2021

Background

In May 2020, the Strategic Communications Plan for years 2020-2022 was adopted.

Staff has accomplished several goals and objectives outlined in this plan. 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 social media style guide and other templates. We've also expanded our education program—shifting all in-person seminars to online webinars and growing attendance by 40% from the year prior.

Additionally, staff has expanded our eCorrespondence efforts by creating our first eNewsletter, designed with our members in mind. There are two separate and focused campaigns within this eNewsletter: (1) Journey to Retirement, written specifically for our Active and Deferred members; and (2) Life After Retirement, geared towards our retirees.

Staff is on track to implement the full plan on schedule by the end of 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 5



San Bernardino County Employees'
Retirement Association

Logo



Service • Accountability • Security

Logo with Tagline

Aa

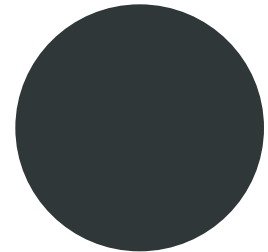
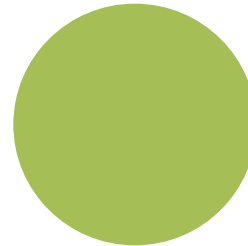
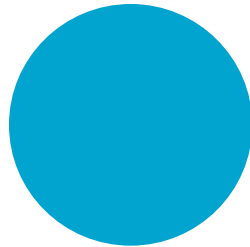
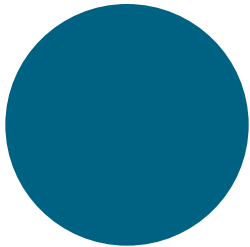
Typography

Roboto is a Google font that has a mechanical skeleton with largely geometric forms. At the same time, the font features friendly and open curves, making it modern and approachable. Regular and Bold should be used for standard communications. Light and Medium can be used to create additional text hierarchy where necessary.

Exhibit A: Page 7

Colors

As one of the most defining and memorable components of a brand, the colors represent SBCERA's visual identity. **Blue** conveys loyalty, trust, and stability, all of which are engrained into the SBCERA brand. The **bright blue** represents the vibrancy of the brand and helps appeal to the future generation of SBCERA members. **Green** has a strong correlation with safety and stability, as well as strong financial association, representing the reliability that SBCERA provides to their members.



Business Cards

Service
Accountability
Security

Joseph Michael
Chief Information Officer



San Bernardino County Employees'
Retirement Association

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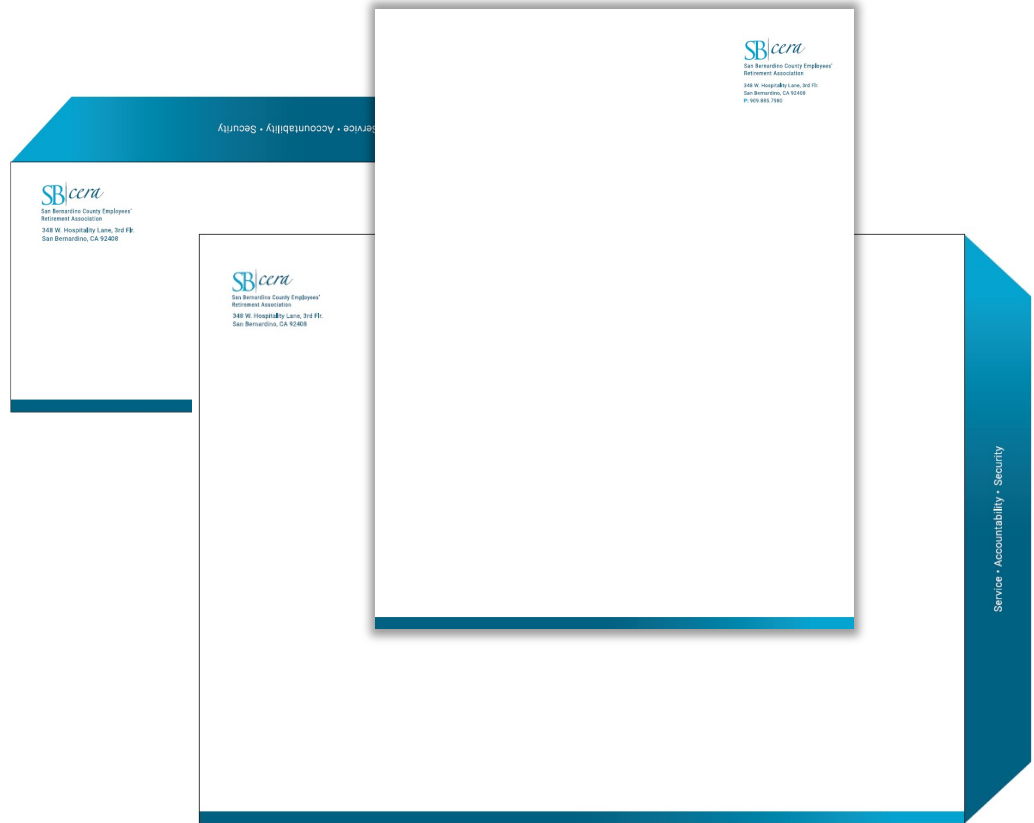
sbcera.org

Milestone Postcards



Exhibit A: Page 10

Letterhead



Retirement Consultation Guide



Use this resource as you plan your service retirement.



Exhibit A: Page 11

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

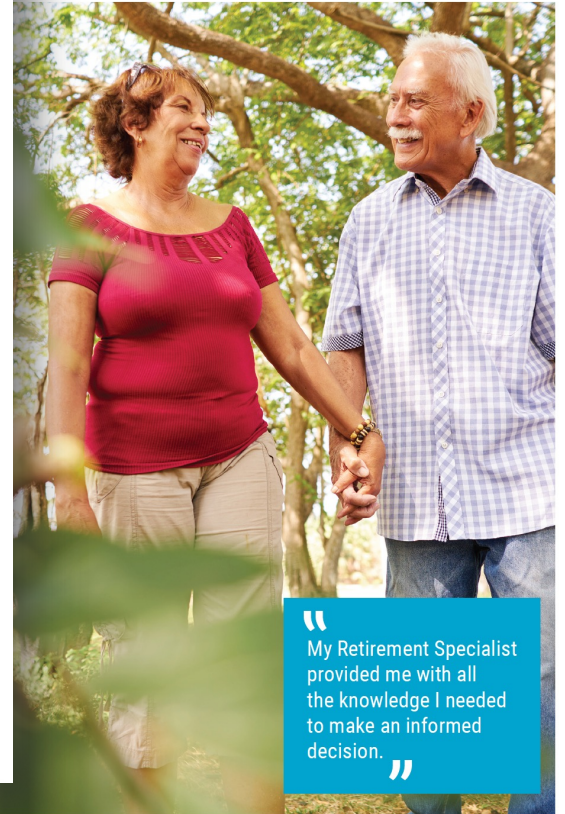
With SBCERA as a resource, decisions to make at retirement

- | | |
|---|----------------------------------|
| 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.”

The image shows the top-left corner of a document cover. The text "2019" is in a large, bold, dark blue font. Below it, the word "POPULAR" is in a smaller, dark blue font. The main title "ANNUAL FINANCIAL REPORT" is in a large, bold, dark blue font, arranged in three lines. At the bottom right, the words "County Employee" and "plan" are partially visible in a small font. The background is white with a green diagonal stripe running from the top left towards the bottom right.

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 the Popular Annual Financial Report (PAFR). SBCERA's financial statements (the "statements") are presented in a manner to conform to PAFR is derived from information contained in SBCERA's Comprehensive Annual Financial Report (CAFR) for the year ended June 30, 2019, but does not replace the CAFR. The PAFR does not replace the CAFR, but is intended to provide a more detailed Financial Accounting Principles (FAP) information presented in this report in conjunction with the entire CAFR, which is available at www.sbcera.org.

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[illegible]

| BENEFITS FOR THE YEAR ENDED JUNE 30, 2015 | | REFUNDS PAID | |
|--|----------|------------------------|---------|
| BENEFITS PAID | \$56,385 | \$12,123 | |
| (AMOUNTS IN THOUSANDS) | | (AMOUNTS IN THOUSANDS) | \$3,679 |

AVERAGE MONTHLY RETIREMENT BENEFIT
\$3,679

PLAN OVERVIEW

[illegible]

SBCRA AWARDED FOR 2018 POPULAR ANNUAL FINANCIAL REPORT

[illegible]

SBCERA BOARD

[illegible]

BOARD MEMBERS
AS OF JUNE 30, 2019

James Southford
Board Chair
Executive Committee
Appointed by Board of Supervisors

Sean Flynn
Administrative Committee
Appointed by Board of Supervisors

York Williams
Administrative Committee
Appointed by Board of Supervisors
Elected by General Members

Michael Kennedy
Audit Committee
Appointed by Board of Supervisors

John Johnson
Finance
Ex-Officio

2018-19 IN NUMBERS

\$10.6 BILLION
TOTAL NET POSITION

80%
FUNDED (AY 2019)

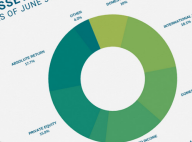
42,000 MEMBERS

\$3,679
AVERAGE MONTHLY BENEFIT

INVESTMENTS

[illegible]

SET ALLOCATION



HISTORY OF INVESTMENT PERFORMANCE



Note: The "Other" category includes Timber, Infrastructure, Commodities, and Investment Funds.

| Year | Percentage |
|------|------------|
| 2011 | 17.1% |
| 2012 | 17.5% |
| 2013 | 6.4% |
| 2014 | 4.0% |
| 2015 | 1.6% |
| 2016 | 4.4% |
| 2019 | 4.6% |



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 15

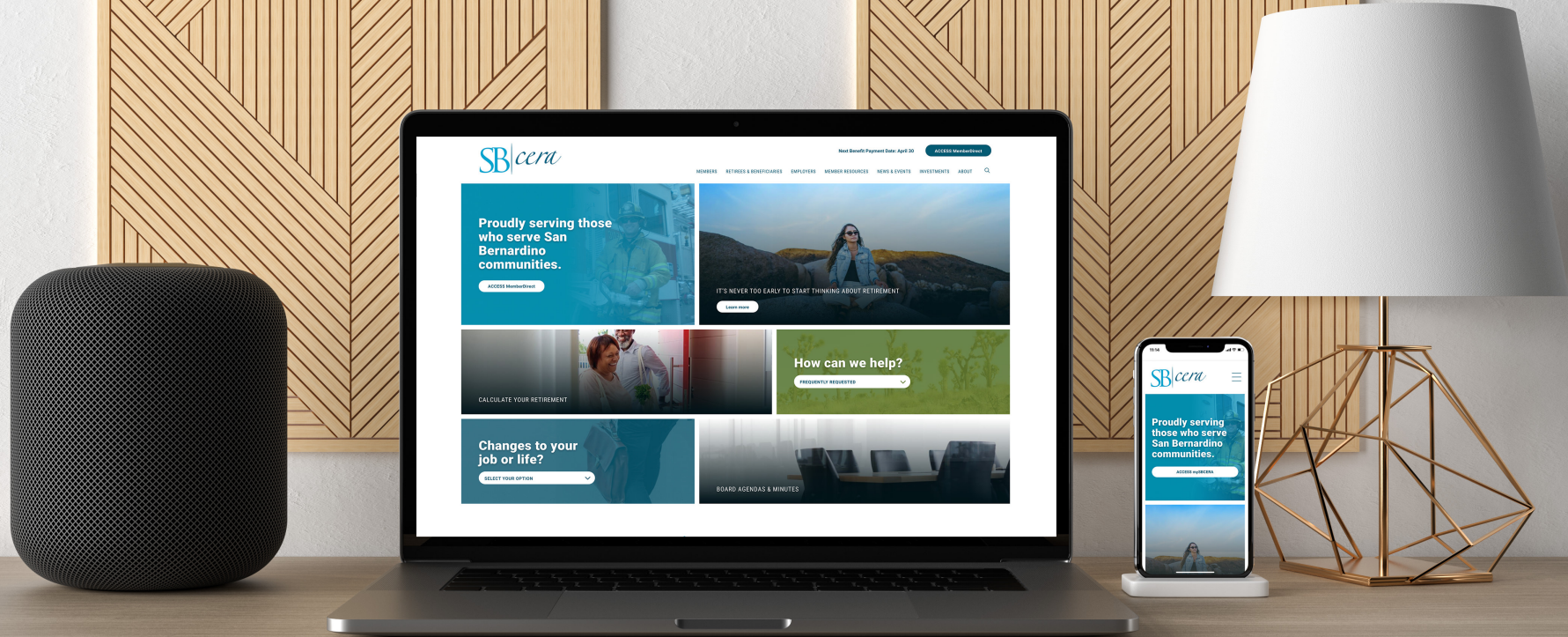
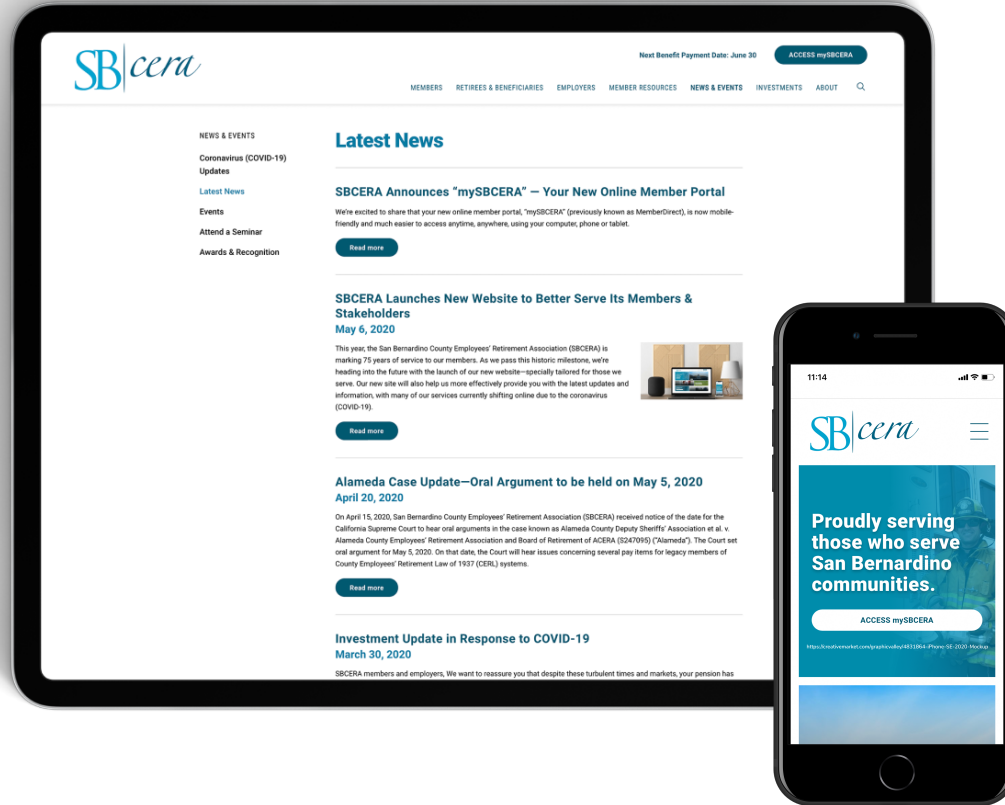


Exhibit A: Page 16



Since the launch, we've seen a **30% increase** in website visits, users are up by **38%**, and pageviews have increased by **164% percent**.

Beyond this, visitors are spending **28% more time on the site** to find the answers they need without ever having to pick up the phone or send an email.

Social Media Guidelines

SOCIAL MEDIA STYLE GUIDELINES

Exhibit A: Page 19

LinkedIn

SBCERA's LinkedIn page @SBCERA uses the image size templates that are created in Canva.

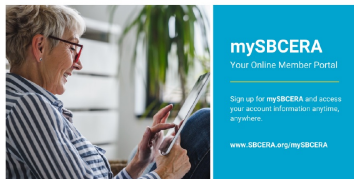


TWITTER

SBCERA SOCIAL MEDIA STYLE GUIDELINES | 16

Twitter

SBCERA's Twitter page @SBCERA uses the image size templates that are created in Canva.

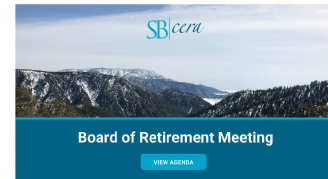
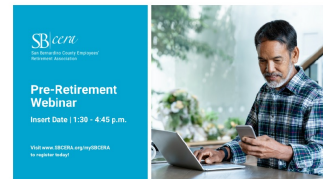


FACEBOOK

SBCERA SOCIAL MEDIA STYLE GUIDELINES | 17

Facebook

SBCERA's Facebook page @SBCERA uses the image size templates that are created in Canva.



Member Outreach & Education

Online Webinars

In 2020, we had **1,044 members** attend our online webinars, growing attendance by 40%.

72 percent said information presented is extremely useful.

82 percent said they are extremely likely to recommend the webinar to a co-worker.

New Electronic Newsletter

Two separate and focused campaigns

In the Customer Service Survey we did a little over a year ago, **72 percent** 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:** Create new videos to help tell SBCERA's story and increase educational awareness. Develop content for each video based on frequently asked questions and popular topics.
2. **Employer Handbook:** Create an Employer Handbook that will serve as a helpful guide to participating employers that will provide an overview of employees' SBCERA benefits, funding for those benefits, and the role of a participating employer.
3. **Educational Webinars & eCorrespondence:** Leverage communication technology resources to provide educational webinars and expand employer outreach.
4. **Plan Sponsor Event:** Host a future Plan Sponsor event designed to empower our employers through education and meaningful connection. This event will be inclusive of feedback received from the recent employer survey to include priority topics.

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Retirement Association

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