



San Bernardino County Employees'
Retirement Association

Strategic Communications Plan

2020 - 2022

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Executive Summary

SBCERA’s strategic communications plan is designed to be consistent with the Mission, Values, and Pillars outlined in our Triennial Strategic Plan for Fiscal Years 2020-22, approved by the SBCERA Board of Retirement in May 2019. This plan does the following:

- Establishes the organization’s guiding principles for communications;
- Outlines the messaging that will be used in all efforts;
- Details the tools that will be used to deploy the plan; and
- Identifies the metrics that will be used to measure its effectiveness.

This plan is designed as a guide to define, shape, and communicate the organization’s mission, vision, and strategic priorities. It is of the highest importance that this be considered during every interaction—from one-on-one meetings with stakeholders, to communicating with members, interactions with the media, email correspondence, and beyond.

Finally, this plan is a living document. As communication tools evolve, metrics shift, and technology continues to progress, it may be necessary to re-evaluate the plan and make updates as needed.



“

**PROUDLY SERVING
THOSE WHO SERVE
SAN BERNARDINO
COMMUNITIES.**

”

Target Audiences

SBCERA has a number of various stakeholder groups who have different needs, interests and preferred means of communicating. SBCERA may communicate broadly to many of these “audiences” at once, or tailor its messaging to a specific group—depending on the topic.

Primary Audiences

1. Active Members

- New members
- Mid-Career
 - 1-5 Years
 - 5-Years (Vested)
 - Eligible to Retire

2. Pre-Retirement/Retiring

3. Deferred

- Reciprocal
- Vested

4. Retirees

5. Beneficiaries

6. Participating Employers

- Elected Officials
- Senior Leadership
- Payroll and HR Staff
- Communications Staff

7. Prospective Members



Additional Audiences

1. Public Officials

2. Member Associations/Other Retirement Systems

3. Related Professionals

4. Media

5. Labor Groups

Internal

1. Board Members

2. Employees

3. Consultants and Vendors

Master Narrative & Key Messages



The combination of a master narrative and key messages provides recommended language to ensure all communication done on behalf of SBCERA is clear, concise, and easy to understand.

Master Narrative

SBCERA is a defined benefit pension plan providing retirement, disability, and death benefits on behalf of approximately 42,000 members and beneficiaries. SBCERA serves 18 employers throughout California and invests more than \$10 billion in assets.

Mission Statement

It is the mission of the San Bernardino County Employees' Retirement Association (SBCERA) to provide 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 the 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;
- Appropriately 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.

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 has a set of Strategic Priorities, which are elaborated in the [Triennial Strategic Plan](#) located on our website at www.sbcera.org.

SBCERA has been administering secure retirement benefits since 1945. As SBCERA has grown, so has our responsibility to provide superior service, communications, and administration of retirement benefits.

Key Messages

These messages are designed to be consistent with the Triennial Strategic Plan as well as SBCERA's overall mission.

Key Message 1: Superior Service

SBCERA provides a superior service experience for all its members and stakeholders.

- 1.1** SBCERA has a skilled, confident, and capable team committed to serving those who serve San Bernardino communities.
- 1.2** SBCERA provides the highest quality of resources to members through educational opportunities such as retirement seminars, webinars, and online material.
- 1.3** SBCERA approaches its commitment and service enthusiastically.
- 1.4** SBCERA delivers service to membership in an accurate, courteous, prompt, professional and cost-efficient manner.

Key Message 2: Transparency & Accountability

SBCERA is accountable to its members and stakeholders.

- 2.1 SBCERA is committed to conducting business in an open, transparent and impartial way.
- 2.2 SBCERA ensures the decisions we make and how we conduct business are clearly communicated and understood.
- 2.3 SBCERA has a duty to serve both Members and Plan Sponsors. SBCERA strives for continual improvement in our service, and transparent communication.
- 2.4 SBCERA administers benefits impartially, fairly, and in accordance with the applicable law.

Key Message 3: Security

SBCERA is committed to providing a secure retirement.

- 3.1 SBCERA provides retirement security to its members and beneficiaries by paying earned benefits now and in the future.
- 3.2 SBCERA is committed to protecting personal information for our members while keeping all data safe and secure.
- 3.3 SBCERA is committed to modernizing and streamlining technologies in an effort to enhance overall security and efficiencies.

Key Message 4: Prudent Fiscal Management

SBCERA practices prudent fiscal management to build, monitor, and maintain the Plan for today and future generations to come.

- 4.1 SBCERA appropriately sets employer and member contributions in accordance with responsible funding practices.
- 4.2 SBCERA diversifies the investments of the system to minimize the risk of loss and to maximize the rate of return.
- 4.3 SBCERA recognizes the importance of efficiently managing our resources and responsibly funding the Plan over time.

Key Message 5: Leadership

SBCERA is a leader and collaborator in all areas of retirement and pension services.

- 5.1 SBCERA is forward-thinking and pairs advanced technology with leading operational practices that help increase effectiveness and lower costs.
- 5.2 SBCERA leadership participates in responsible legislative advocacy.
- 5.3 SBCERA recruits and hires the most skilled and qualified personnel in their respective fields.
- 5.4 SBCERA strategically plans for the future.

Guiding Principles



Principle 1: Be transparent.

As a public agency, SBCERA operates in an open and transparent manner. These principles should be reflected in all communications efforts and by openly communicating various aspects of the retirement plan.

Principle 2: Be clear.

Words have the potential to inform, encourage, and empower. But the wrong words can leave people uncomfortable, overwhelmed, or confused. Cutting back on jargon and delivering messages to help provide a clear understanding is essential.

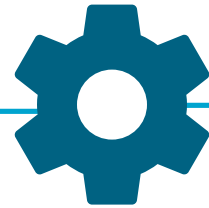
Principle 3: Be on message.

Retirement information is complex and can be confusing. When communication related to the Plan is difficult to understand, the information can become more overwhelming. A set of key messages and a master narrative have been carefully created to help explain the SBCERA's mission and should be used on all fronts of communication efforts, both internally and externally.

Principle 4: Be engaging.

Effective communication is undoubtedly a two-way street. People expect to weigh in with their thoughts and opinions on various topics that are communicated. Communication efforts should encourage audience engagement and work to create a sense of collaboration when it makes sense.

Operational Goals & Objectives



A variety of tactics should be implemented to reach the goals and objectives outlined in this plan. The goals are described in the following categories: branding, collateral development, member outreach, employer outreach, owned media, and measuring.

Branding: The visual brand identity is the face and personality that is presented to members, stakeholders, and the public at large. The new SBCERA brand identity entails the core visual elements which will be applied to print, website, social media, presentations, events, and other touch points.



Complete the rollout and launch of the new branding, internally and externally.
Target Completion: July 2020

Collateral Development: Collateral is any communication tool used to help share SBCERA's message. Examples include, but are not limited to: fact sheets, eNewsletters, website, videos, photos, PowerPoint presentations, folders, business cards, stationery, brochures, etc.



Digital Assets: Create branded digital assets to be used on Facebook, Twitter, LinkedIn, and Instagram in an effort to better represent SBCERA. Create branded templates for news releases, eNewsletter, and general eCorrespondence.
Target Completion: July 2020



Video: Produce a two-minute explainer video that helps tell SBCERA's story, increases educational awareness, and highlights the impact SBCERA has on those who serve San Bernardino County communities.
Target Completion: End of 2020



Video: Produce topic-specific video content (life begins at retirement, service retirement, disability retirement, reciprocity, advantages of a defined benefit, special durable power of attorney, etc.). Determine the method of video production based on content.
Target Completion: End of 2021



Photo: Collect quality photos that help tell SBCERA's story and help highlight the impact SBCERA employees, active members, retirees and employers are making each day. The library of these photos can be a combination of photos provided by participating employers and internally captured with SBCERA equipment.
Target Completion: End of 2020

Member Outreach: Thoughtful member relations and outreach play instrumental parts in an effective communications plan. The work done in this area is a key ingredient for SBCERA to nurture positive, cooperative relationships with the members we serve.



mySBCERA: Successfully launch the refreshed online member portal, mySBCERA. Marketing for mySBCERA can be accomplished through a social media campaign, e-mail to members and employers, all directed to the seamless integration on the new SBCERA website.

Target Completion: Spring 2020



eCorrespondence: In the recent Customer Service Survey, 72 percent of members shared they prefer to be informed through e-mails. SBCERA must elevate eCorrespondence for members by creating a branded template for bite-sized information pieces outside of the future eNewsletter.

Target Completion: End of 2020



Member Newsletter: Create a template for a Member eNewsletter. In the recent Customer Service Survey, 46 percent of members shared they prefer SBCERA to communicate with them on a quarterly basis.

Target Completion: End of 2020



Seminars: Conduct a qualitative review of the content presented at Retirement Seminars, Webinars, and New Employee Orientations. This process should include a comprehensive review of overall content and presentation delivery.

Target Completion: End of 2020

Employer Outreach: Thoughtful employer relations and outreach are also an instrumental component of this plan. The work done in this area is a key ingredient for SBCERA to nurture positive, collaborative relationships with the employers we serve.



Employer Survey: Survey employers to determine mutual priorities and build consensus on strategic initiatives.

Target Completion: July 2020



Employer Handbook: Create an Employer Handbook that will serve as a helpful guide to SBCERA participating employers that will provide an overview of employees' SBCERA benefits, funding for those benefits, and the role of a participating employer.

Target Completion: End of 2020

Employer Outreach (Continued):



Use communication technology resources to provide both in-person and remote training for employers.

Target Completion: End of 2021



Assist in the EmployerDirect refresh project.

Target Completion: End of 2021

Owned Media: Owned media are any communication tools that SBCERA has control over such as the SBCERA website, social media platforms, etc.



Website: Successfully launch new website in the spring of 2020. Following the launch of the new website, continually post fresh content, keeping information current and relevant.

Target Completion: Spring 2020



Social Media: Increase overall engagement and following on social media.

Target Completion: End of 2021

Measuring: It is important to measure perceptions of SBCERA before, during, and after deployment of this communications plan. This will provide important measurable data to determine whether our efforts are having the intended impacts strived for.



Conduct a bi-annual survey about perceptions from members and stakeholders regarding communication and outreach efforts, looking at both qualitative and quantitative data. This will serve as a follow-up to the 2019 Member Engagement Survey.

Target Completion: End of 2021



Evaluate survey results and modify communications efforts as needed.

Target Completion: End of 2022

Conclusion

Enhancing trust, credibility, and transparency for our members and stakeholders is one of the highest priorities for SBCERA. We are committed to developing and implementing the most effective communication objectives and methods to ensure delivery of consistent, clear, and helpful messaging. The desired outcome of this plan is for our audiences to be well-informed, engaged, and truly understand the information being delivered.