Vision and Mission

VISION

The vision of SDCERS is to be an independent, leading edge, actuarially and financially sound and transparent pension plan, responsive to its participants with excellence in governance, management, leadership and service.

MISSION

The mission of SDCERS is to deliver accurate and timely benefits to its participants and ensure the Trust Fund’s safety, integrity and growth.

ABOUT SDCERS

SDCERS was established in 1927 by the City of San Diego to provide retirement, disability and death benefits to its participants. Now, more than eighty years later, SDCERS provides a comprehensive range of member services to more than 20,000 active, retired and deferred members from the City of San Diego, the San Diego Unified Port District and the San Diego County Regional Airport Authority.

A 13-member Board of Administration is responsible for the prudent administration of the benefits and oversees the investment portfolio for the system’s trust fund. Board meetings are open to the public; a schedule of these meetings is available at www.sdcers.org.

ABOUT OUR PRIORITIES

Each year, SDCERS’ Board of Administration and staff leadership agree on a set of top priorities that support our Vision and Mission statements. In turn, the SDCERS management team develops a list of action plans to support those priorities.

These action plans are typically above and beyond the regular daily business conducted by staff, and may take more than one year to complete. The number of priorities and supporting action plan items in any given year is based on the needs of the organization, the Board of Administration, and the participants in SDCERS. The following page shows SDCERS’ priorities and action plans for FY 2015.

We look forward to sharing a report card on how we did at the end of the fiscal year.
Priorities and Action Plans for Fiscal Year 2015

**PRIORITY ONE: CONTINUED PURSUIT OF EXCELLENCE IN MEMBER COMMUNICATIONS AND CONFIDENCE THROUGH INTERACTIVE OUTREACH AND EDUCATION**

*Supporting Action Plans*

- Repackage member counseling
- Implement website experience survey
- Establish Member Services metrics and performance goals
- Revamp and implement retirement seminars
- Implement online retirement application

**PRIORITY TWO: STRENGTHENED INTERNAL CONTROLS AND ACCOUNTABILITY**

*Supporting Action Plans*

- Complete IRIS production stabilization and transition to on-going support
- Update policies and process narratives incorporating IRIS implementation
- Resolve benefit and service calculation corrections resulting from IRIS conversion audit of member records
- Identify, develop and implement training programs and policies
- Complete document backfile conversion

**PRIORITY THREE: CONTINUED PURSUIT OF INVESTMENT PROGRAM EXCELLENCE**

*Supporting Action Plans*

- Review rebalancing model and recommend changes as appropriate
- Issue General Investment Consultant Request for Proposals and make selection
- Bring forth potential new ideas for the Opportunity Fund

**PRIORITY FOUR: CONTINUED LEADERSHIP IN PENSION GOVERNANCE**

*Supporting Action Plans*

- Analyze and determine appropriate skill levels needed for optimal organizational performance
- Implement website disclosure of appeals process and ethics complaints
- Encourage and support management team involvement in key role opportunities in conferences, committees and professional organizations that support SDCERS mission
- Engage in peer review for Internal Auditor to ensure compliance with Institute of Internal Auditor standards
- Explore feasibility of implementing live streaming of Board of Administration meetings