SAN DIEGO CITY EMPLOYEES’ RETIREMENT SYSTEM

PRIORITIES AND ACTION PLAN
FISCAL YEAR 2018
Vision and Mission

VISION
To be an independent, leading edge, financially sound, well-governed, and transparent pension plan.

MISSION
To deliver accurate and timely benefits to its participants and ensure the Trust Fund’s safety, integrity, and growth.

ABOUT THE SAN DIEGO CITY EMPLOYEES’ RETIREMENT SYSTEM (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 2018.

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 2018

**PRIORITY ONE: CONTINUED PURSUIT OF EXCELLENCE IN SERVING OUR MEMBERS**

- Expand Seminar Education Offerings
- Redesign Website to Improve Member Access to Online Services and Information
- Increase Member Portal Registrations by 25%
- Utilize Performance Benchmarks in Reporting Member Benefit Processing

**PRIORITY TWO: CONTINUED FOCUS ON DATA ACCURACY AND SYSTEM INTEGRITY**

- Implement Recommendations from Information Technology Risk Assessment
- Identify and Implement Process Improvements for Retiree Health and Internal Workflow
- Transition Employer Reporting Submission to Plan Sponsors
- Update Non-Financial Membership Data

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

- Review of Fee Adjusted Performance
- Review and Update Investment Policy Statement
- Conduct Custodial Bank Search
- Continue to Evaluate New Ideas for the Opportunity Fund

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

- Implement Best Practices for Office Security
- Develop Key Performance Indicator Analysis for Board Financial Reporting
- Provide Plan Sponsors Compliance Education
- Conduct Employee Opinion Survey
- Optimize and Realign Organizational Staffing