SAN DIEGO CITY EMPLOYEES' RETIREMENT SYSTEM

PRIORITIES & ACTION PLAN

FISCAL YEAR 2020
Mission and Vision

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

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

CORE VALUES
Customer Service | Accountability | Professionalism | Fiduciary | Integrity | Transparency

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 90 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 Mission and Vision 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 plan for FY 2020.

We look forward to sharing a report card on how we did at the end of the fiscal year.
Priorities and Action Plan for Fiscal Year 2020

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

**Supporting Action Plan**

- Improve Member Tax Reporting Process
- Review Website Content
- Increase Member Portal Registrations
- Post Member “How-To” Videos on SDCERS’ Website
- Improve Internal Workflow Processes
- New Member Orientation

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

**Supporting Action Plan**

- Develop Deduction Agency Portal
- Financial Accounting Software Package Version Upgrade
- Update Non-Financial Membership Data
- Update Beneficiary Membership Data

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

**Supporting Action Plan**

- Conduct General Investment Consultant Search
- Conduct Proxy Voting Vendor Search
- Implement Custodian Bank Alternative Investment Services Module

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

**Supporting Action Plan**

- Create a Quality Assurance Program
- Develop a Privacy Program
- SDCERS Recognition