2026-2029

StanCERA Strategic Plan: StanCERA CARES

Plan Adopted: 05/26/2026

2026-2029 StanCERA Strategic Plan

Our Vision

Empowering our members through education and technology to play a proactive role in understanding and managing their retirement benefits.

Our Mission

Provide and promote comprehensive, financially sound retirement plans in a professional, efficient, and courteous manner.

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Strategic Planning Objectives for 2026-2029

StanCERA is a well-functioning organization, delivering on its promise to provide members with the valuable retirement benefits offered through the pension plan adopted by its Plan Sponsors. This strategic plan aims to build on that success and recognize that continued success depends on investing in its processes and adapting to an ever-changing environment.

StanCERA CARES represents the aspiration for the Strategic Plan. The planning objectives set guiding principles for StanCERA and guide organizational efforts. StanCERA cares about each objective and uses them as a framework for practical initiatives.

StanCERA CARES:

Customer engagement (Primary Customers are: plan members, beneficiaries, and those working to help reach their retirement goals.)

Administrative excellence

Reporting and transparency

Efficiency and innovation

Sustainability

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Objective 1

Customer/Member engagement: positive and meaningful interactions with members and other customers in support of StanCERA's mission

Success Factors

Define and maintain service standards; improve access to benefit information through user-friendly online tools, and provide education and communication that support long-term financial wellness.

Goals

- Establish and Maintain High Service Standards
  - Define service levels (response and processing times)
  - Monitor performance and report results
  - Maintain high member satisfaction
- Enhance Access to Information and Self-Service Tools
  - Enhance online tools and self-service options
  - Ensure platforms are user-friendly and current
  - Increase digital adoption
- Strengthen Member Education and Communication
  - Provide clear, timely benefit information
  - Offer financial wellness resources
  - Tailor outreach by member group
- Improve Member Engagement and Feedback Utilization
  - Implement surveys and feedback tools and use feedback to improve services
  - Track engagement metrics
- Promote Consistency and Quality in Member Interactions
  - Standardize processes and training
  - Improve documentation and communication
  - Promote a member-focused culture

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Objective 2

Administrative excellence: an organization that evolves and grows to meet the needs of its members

Success Factors

Support organizational development through staff growth and Board engagement; strengthen relationships with plan sponsors and partner organizations; improve transparency and access to information for the public and stakeholders and foster a culture of support and continuous improvement.

Goals

- Strengthen Organizational Development
    - Invest in staff training and professional development
    - Support effective Board governance and engagement
    - Ensure continuity through succession planning
- Enhance Relationships with Plan Sponsors and Partners
    - Maintain regular communication and collaboration
    - Provide timely and accurate reporting to the public and stakeholders
    - Strengthen partnerships that support member services
- Improve Transparency and Access to Information
    - Provide clear, accurate, and timely public information
    - Enhance reporting and accessibility of key documents
    - Ensure consistency in communications across platforms
- Promote a Culture of Continuous Improvement
    - Identify and implement process improvements
    - Encourage innovation and operational efficiency
    - Monitor performance and adapt to evolving needs

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Objective 3

Reporting and transparency: information that is easy to access and improves understanding

Success Factors

Report on key organizational activities; establish metrics to track performance; enhance and communicate due diligence efforts, and maximize the use of online resources where appropriate.

Goals

- Enhance Organizational Reporting
  - Provide clear, consistent, and accurate reporting on key activities
  - Align reporting with Board and stakeholder needs
- Establish and Monitor Performance Metrics
  - Define key performance indicators (KPIs)
  - Track and evaluate performance against targets
  - Report results to support decision-making
- Strengthen Due Diligence Practices
  - Standardize documentation of due diligence efforts
  - Improve visibility of review and oversight processes
  - Communicate key findings to stakeholders
- Expand Use of Digital Tools and Resources
  - Leverage online platforms to improve access to information
  - Streamline processes through technology solutions
  - Increase efficiency through digital adoption

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Objective 4

Efficiency and innovation: predictable, high-quality results with no wasted resources

Success Factors

Improve the cost-efficiency of service delivery; identify and implement automation opportunities; reduce staff time required for recurring processes, and establish a structured approach to ongoing process improvement.

Goals

- Improve Cost Efficiency of Services
  - Evaluate and optimize service delivery costs
  - Identify cost-saving opportunities without impacting service quality
  - Monitor and report cost performance
- Expand Automation and Technology Use
  - Identify and implement automation opportunities
  - Leverage systems to streamline workflows
  - Reduce manual processes and errors
- Reduce Staff Time on Recurring Processes
  - Simplify and standardize routine tasks
  - Eliminate redundancies and inefficiencies
  - Reallocate staff time to higher-value activities
- Establish a Continuous Improvement Framework
  - Implement a structured process improvement approach
  - Encourage staff participation in identifying improvements
  - Track and measure outcomes of improvement efforts

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Objective 5

Sustainability: tools and resources that are built for long-term success

Success Factors

Establish clear and structured administrative policies, processes and procedures; ensure continuity through effective organization and succession planning; identify long-term IT and infrastructure needs, including investment management, benefits administration, and reporting systems; simplify processes to improve efficiency and sustainability.

Goals

- Strengthen Policies and Procedures
    - Develop and maintain clear, standardized policies and processes
    - Ensure documentation is current, accessible, and consistently applied
    - Align procedures with regulatory and operational requirements
- Ensure Continuity and Succession Planning
    - Establish cross-training and knowledge transfer practices
    - Develop succession plans for key roles
    - Reduce reliance on single points of failure
- Plan for Long-Term Technology and Infrastructure Needs
    - Assess and prioritize system and infrastructure requirements
    - Enhance investment, benefits, and reporting systems
    - Align technology planning with organizational goals
- Simplify and Standardize Processes
    - Streamline processes to improve efficiency and usability
    - Reduce complexity and maintenance burden
    - Promote practical, sustainable workflows

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Our Process

To realize its vision and fulfill its mission, StanCERA follows a process similar to the agricultural cycle characteristic of the region: Prepare, Plant, Grow, and Harvest. These stages also represent the stages of planning for retirement benefits provided to members and beneficiaries. Sustained attention is required to ensure success at each stage.

StanCERA developed the “plant, grow, harvest” tagline logo as a reminder of the retirement cycle, and for use in member education and communications.

StanCERA staff maintain Strategic Goals Action Items , which outlines ongoing work to achieve the objectives. Staff will provide Strategic Goals updates at least twice a year to the Board of Retirement.