

Orange County Employees Retirement System  
2223 East Wellington Avenue | Santa Ana | 92701

# 2020-2022 STRATEGIC PLAN



# MISSION, VISION AND VALUES

## MISSION STATEMENT:

We provide secure retirement and disability benefits with the highest standards of excellence.

## VISION STATEMENT:

To be a trusted partner providing premier pension administration, distinguished by consistent, quality member experiences and prudent financial stewardship.

## VALUES:

- **O**pen and Transparent
- **C**ommitment to Superior Service
- **E**ngaged and Dedicated Workforce
- **R**eliable and Accurate
- **S**ecure and Sustainable

# STRATEGIC PLAN

## **2020-2022 STRATEGIC GOALS**

- Fund Sustainability
- Excellent Service and Support
- Risk Management
- Talent Management
- Effective Governance

# FUND SUSTAINABILITY

## **STRENGTHEN THE LONG-TERM STABILITY OF THE PENSION FUND**

**Objective A:** Mitigate the risk of significant investment loss

**Objective B:** Prudent Use and Security of Resources

# EXCELLENT SERVICE AND SUPPORT

## **ACHIEVE EXCELLENCE IN THE SERVICE AND SUPPORT WE PROVIDE TO OUR MEMBERS AND PLAN SPONSORS**

- Objective A:** Provide accurate and timely benefits
- Objective B:** Provide education to our members and plan sponsors
- Objective C:** Continuously improve business processes and procedures to be efficient and effective

# RISK MANAGEMENT

## **CULTIVATE A RISK-INTELLIGENT ORGANIZATION**

**Objective A:** Provide system and data security and a robust business continuity solution

**Objective B:** Ensure a safe and secure workplace and public service facility

# TALENT MANAGEMENT

## **RECRUIT, RETAIN AND INSPIRE A HIGH-PERFORMING WORKFORCE**

**Objective A:** Recruit and retain a high-performing workforce to meet organizational priorities

**Objective B:** Develop and empower every member of the team

**Objective C:** Cultivate a collaborative, inclusive and creative culture

# EFFECTIVE GOVERNANCE

**IMPROVE THE EFFECTIVENESS AND EFFICIENCY OF THE BOARD AND STAFF BY CLARIFYING ROLES AND RESPONSIBILITIES, IMPROVING OVERSIGHT, CLARIFYING ACCOUNTABILITY AND IMPROVING DECISION MAKING**

**Objective A:** Employ a governance structure that supports a dynamic System

**Objective B:** Improve the governance and management of OCERS' records





We provide secure retirement and disability benefits  
with the highest standards of excellence.

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM  
[www.ocers.org](http://www.ocers.org)