

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

2018-2020 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

2018-2020 STRATEGIC GOALS

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

FUND SUSTAINABILITY

STRENGTHEN THE LONG-TERM STABILITY OF THE PENSION FUND

Objective: Mitigate the Risk of Significant Investment Loss

Objective: Develop an Integrated View of Pension Assets and Liabilities

Objective: Employ a Governance Structure that Supports a Dynamic Investment Program

Objective: Prudent Use of Resources

EXCELLENT SERVICE AND SUPPORT

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

Objective: Provide Accurate and Timely Benefits

Objective: Provide Education to our Members and Plan Sponsors

RISK MANAGEMENT

CULTIVATE A RISK-INTELLIGENT ORGANIZATION

Objective: Provide System and Data Security and a Robust Business Continuity Solution

Objective: Implement an Operational Risk Management Program

Objective: Ensure a Safe and Secure Workplace and Public Service Facility

TALENT MANAGEMENT

RECRUIT, RETAIN AND INSPIRE A HIGH-PERFORMING WORKFORCE

Objective: Recruit and Retain a High-Performing Workforce to Meet Organizational Priorities

Objective: Develop and Empower Every Member of the Team

Objective: Cultivate a Collaborative, Inclusive and Creative Culture

