

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

2019-2021 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

2019 BUSINESS PLAN

2019-2021 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 procedures for new employers entering the system

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 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

ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
www.ocers.org