



2024-2026



**Kern County Employees'
Retirement Association**

Strategic Communications Plan



02

Introduction

This is the inaugural Strategic Communications Plan for KCERA and is designed to set out the objectives, messages, and strategies that will be used for the years 2024-2026 to communicate KCERA's programs and policies to various audiences. This plan and its associated communication activities' purpose is to more effectively communicate and engage with KCERA's members, plan sponsors, and other stakeholders.

KCERA's strategic communications plan is designed to be consistent with the Mission of the association, the Guiding Principles, and accomplish the following:

- Establish the Association's direction for communications
- Outline the messaging that will be used in all efforts
- Detail the tools that will be used to deploy the plan
- Identify the metrics that will be used to measure its effectiveness

This plan is created as a guide to define and shape KCERA's communications and strategic priorities, build awareness, and increase understanding of the association. This plan should be considered during every interaction, from one-on-one meetings with members, to communicating with stakeholders, email correspondence, and beyond.

As communication avenues evolve, analytic data is recorded, metrics shift, and technology continues to progress, it may be prudent to re-evaluate this plan and make updates as needed.

Mission

KCERA's mission is to expertly administer retirement benefits, prudently invest the assets of the Association, and provide quality membership services to eligible public employees, retirees and their beneficiaries.

Guiding Principles

This plan is built on the foundation of four concepts that guide KCERA in the development of communications strategies.

Clear & Direct KCERA will strive to use the most direct and straightforward plain language to communicate our policies and programs. We will explain technical terms, avoid jargon, and provide background information to ensure that all of our communications are understandable to the widest possible audience.

Proactive Whenever possible, we will provide information on issues as they come to light, to ensure the most accurate and complete information is available to our members as soon as is practical. KCERA will endeavor to educate members about their benefits as they navigate their careers and retirement.

Transparent We will be open in communicating KCERA business and making information about the policies, finances, and operations available to all stakeholders.

Listening & Learning Communication is interactive, both providing information and receiving feedback. When KCERA listens to stakeholders, it gains by building trust and credibility.

Research

This Communications Plan for KCERA was one of the main objectives for the new Communications Manager. The ideas in this plan were crafted by assessing the state of Communications, attending meetings with Member Services, and engaging in member outreach events.

Administration of KCERA

Oversight of the retirement plan is vested in the nine-member Board of Retirement. The day-to-day administration of KCERA is carried out by the Chief Executive Officer, whose leadership team manages the following areas: Administration, Member Services, Accounting & Reporting, Investments, Information Technology and Communications.

04

Goals & Objectives

- Provide accurate, timely, and understandable information that delivers a consistent, defined brand to members and other stakeholders.
- Improve the effectiveness of KCERA's services and the efficiency of its operations.
- Identify opportunities to improve member communications and education.
- Identify and clearly define the stakeholders and how to engage and educate them.
- Establish significant relationships between KCERA and its stakeholders.
- Keep the lines of communications open to ensure stakeholders continue to receive accurate, timely information.
- Analyze communications activity and track performance.
- Anticipate key stakeholder questions before they ask them.



05 Target Audiences

KCERA has a number of various stakeholder groups who have different needs, interests and preferred means of communicating. KCERA may communicate broadly to many of these audiences at once, or tailor its messaging to a specific group, depending on the topic.

Primary Audiences

- Active Members
 - Early-Career 1-5 Years
 - Mid-Career 5+ Years (Vested)
 - Late-Career Eligible to Retire
- Members with Life Changing Event
 - Marriage, Divorce, Incapacity, Death
- Retiring Members (Active/Deferred)
 - Alternate Payees
- Retired Members
 - Fiduciaries of Retired Members
- Deferred Members
 - Reciprocal (Pre/Post KCERA Membership)
- Terminated (W/Funds on Deposit)
- Beneficiaries
 - Surviving Spouses
 - Surviving Minor Children
 - Guardianships and Powers of Attorney
 - Other Named Beneficiaries
- Prospective Members

Secondary Audiences

Participating Employers/Plan Sponsors

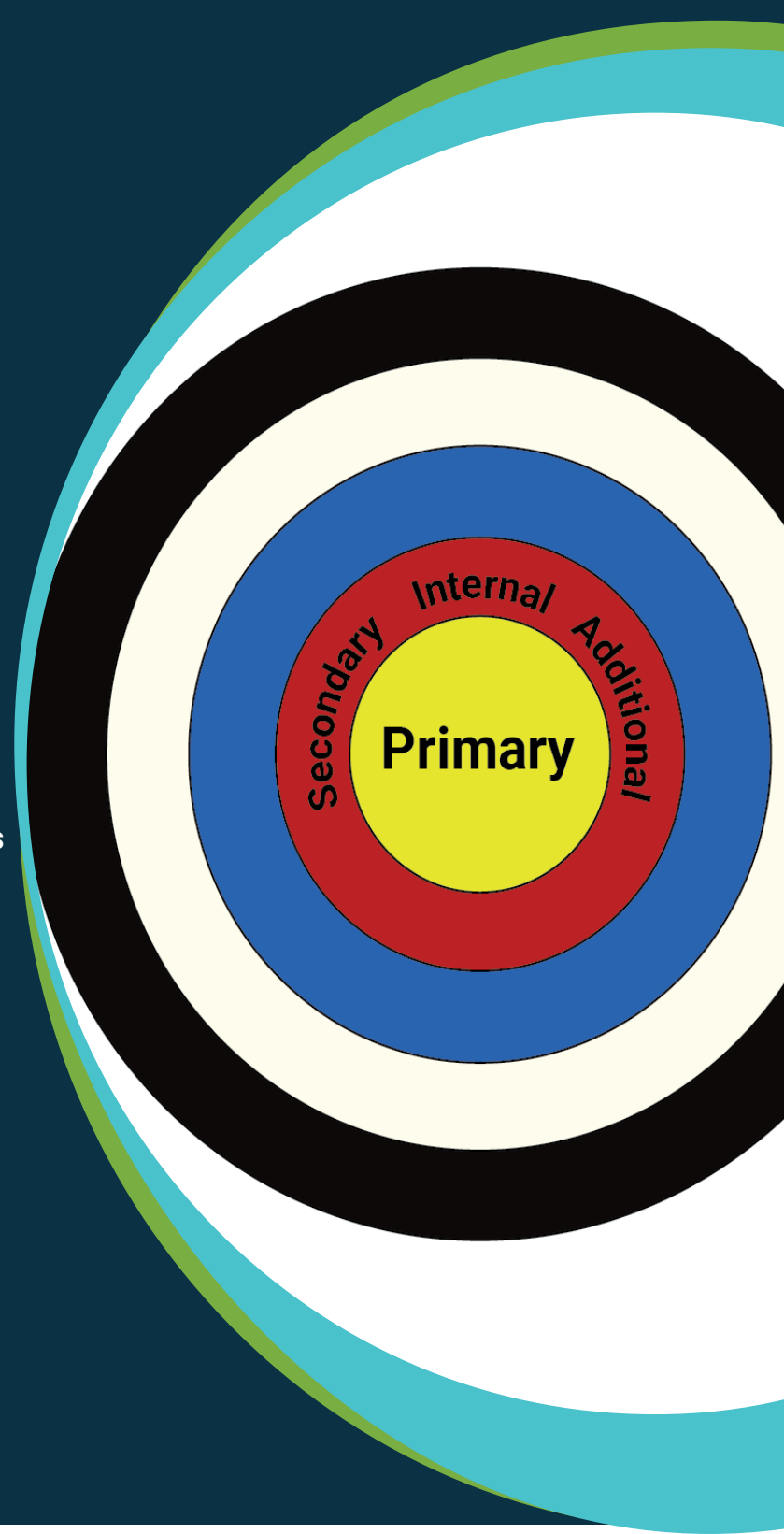
- Senior Leadership
- Payroll and HR Staff
- Communications Staff
- Elected Officials

Internal Audiences

- Board Members
- Employees
- Consultants and Vendors

Additional Audiences

- Member Associations
- Labor Groups
- Other Retirement Systems
- Related Professionals
- Contractors
- Media



New and Ongoing Activities

Administrative

Review and update printed and digital content and outreach materials.

Update website and ensure the site is user-friendly, communicates key messages, and compliments the member portal.

Attend communications-related seminars and conferences to learn about new methods, techniques, and tools.

Member Communications & Education

Attend plan sponsor events & other outreach opportunities. Attend all New Employee and End of Career seminars and identify ways to increase member communication. Attend Retired Employees of Kern County events to communicate directly to retired members. Ensure every *Target Audience* is being communicated to.

Create a local photography library.

Improve internal communications with staff to inform them about upcoming communications activities.

Monitor & Report Performance

Utilize Google Analytics to monitor website traffic and identify trends and anomalies.

Attend KCERA Member Services meetings regularly to survey front line staff on member interactions and frequently asked questions.

Survey members and analyze data to ensure the communications are reaching and being understood by all audiences.

Stakeholder Relations: Multiple strategies should be utilized to inform and educate our stakeholders. The work in this area is instrumental in creating substantial relationships with members and plan sponsors.

Collateral Development: Collateral is any communication tool used to help share KCERA's message. Examples include: fact sheets, milestone cards, web pages, videos, photos, presentations, folders, brochures, rack cards, displays, etc.

- **Printed Collateral:** Assess printed material and redesign with thoughtful consideration of KCERA brand and this communications plan's *Guiding Principles*.
Target Completion: Mid 2025
- **Multimedia:** Expand multimedia resources for member education and outreach by creating quick-tip videos focused on frequently asked questions and popular topics. Produce a short explainer video that helps tell KCERA's story, increases educational awareness, and highlights the impact KCERA has on those who serve Kern County communities. Make videos available on KCERA'S website and YouTube channel.
Target Completion: Early 2025





Stakeholder Relations (Continued):

Member Outreach: Thoughtful member outreach plays an instrumental part of this plan. The work done in this area is a key ingredient for KCERA to nurture positive relationships with the members we serve, while providing them with the tools they need, no matter what stage they're at in their career.

- **Member Engagement:** Create and distribute member surveys. Survey active members yearly. Survey all retiring members directly after retirement to get timely accurate data and compile quarterly. Use data to monitor if communications are effective.
Target Completion: Mid 2024

Stakeholder Outreach: Informing, engaging, and educating our stakeholders is a critical component of this plan. The work done in this area helps KCERA strengthen positive, collaborative relationships with our employers and other stakeholders alike.

- **Plan Sponsor Engagement/Outreach:** Utilize Stakeholder Summits to engage and educate Plan Sponsors. Create and implement Plan Sponsor surveys. Use data to monitor if communications are effective.
Target Completion: Mid 2024
- **Multimedia:** Create video resources specific to each plan sponsor to help educate them on policies that specifically affect their employees. Create a New Employee Orientation video specific for Plan Sponsors when useful.
Target Completion: Mid 2025
- **Networking:** Reach out to plan sponsors to identify common questions and create a FAQ.
Target Completion: Late 2024





Conclusion

At KCERA, we are committed to creating and implementing effective communication objectives and methods to establish delivery of consistent, clear, and helpful messaging. This plan will help ensure our stakeholders are well-informed, engaged, and truly understand the retirement information being delivered and the value of their pension.

Evaluation

The KCERA Strategic Communication Plan is designed to be reviewed at 36 months to determine if goals were accomplished and objectives met.

Excellent Administration Prudent Investment Quality Service

