

**FRESNO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION (FCERA)**  
**Communications Policy**

**I. Purpose**

The purpose of this Communications Policy is to establish guidelines and structure for communications between Fresno County Employees' Retirement Association (FCERA or Association) and its members and outside parties. The policy helps to ensure that members are well informed of their benefits and rights under the Plan and to mitigate the risk of providing inaccurate, insufficient or inappropriate communications to a member or other stakeholder.

**II. Objectives**

- 1) To provide FCERA Members with accurate, timely and easy-to-understand information that is pertinent to their needs with respect to the Association provisions and benefits;
  - a) Not all members learn and retain information in the same fashion. Therefore, a variety of approaches and media are required to assure the effectiveness of the member communications. Content may be distributed in-person, whether one-on-one or in group settings, via distant e-learning applications, through the FCERA's website, mail or email. Presentation of material may be made in verbal, written, graphic, illustrations or video formats.
- 2) To ensure that FCERA's communication material remains up-to-date;
- 3) To ensure that communication with parties outside of FCERA accurately reflect the provisions of the Government Code, Board Bylaws, and FCERA Policies.

**III. Policy**

The Retirement Administrator has ultimate responsibility for the FCERA's Communications Program, as delegated to staff. Communications staff, in conjunction with management, will determine which communications tasks will be undertaken in-house by staff and which will be outsourced to contractors.

All communications will occur in a straight-forward, timely, professional and courteous manner.

- 1) Staff Communications
  - a) Staff will exercise care to avoid the risk of misinterpretation. Staff's role is to inform and not to advise. Communication to members of personal benefit information will be done by Retirement Specialists, the Supervising Retirement Specialist, the Retirement Benefits Manager, the Supervising Account Clerk, or the Assistant Retirement Administrator. The Retirement Communications Analyst will communicate to members regarding benefit information in a general manner.

- b) Staff shall direct media inquiries to the Communications Analyst or Administration. Staff is not authorized to speak to the media on behalf of FCERA unless prior authorization is granted by the Retirement Administrator.
- c) Responses to all Public Information Requests will be coordinated through the Communications Analyst.

2) Trustee Communications

- a) Trustees may give general information on the Association and governing laws and should refer the individual or the request for specific information to Communications Analyst.
- b) Trustees will disclose when they are not representing a Board policy or position.
- c) Trustee communications will be consistent with their fiduciary duty to represent the interest of all Association members and beneficiaries.
- d) The Retirement Administrator will speak for the Board, when needed and the Administrator will advise the Board of contacts received from the media.

3) Frequency of Communications

- a) The Summary Plan Description, titled as Active Member Handbook or Retired Member Handbook, shall be updated as necessary and will be reviewed by staff at least annually and brought to the Board of Retirement for any revisions. The Member Handbooks will be made available to every member of the system upon hire or becoming a member. The handbooks are also available electronically on the FCERA website or by hard copy upon request.
- b) Active members will receive a Benefit Account Statement annually. The Benefit Statement for County of Fresno employees is coordinated through the County Human Resources Department.
- c) Pre-retirement counseling will be provided, including periodic information workshops and seminars for members. The Retirement Communications Analyst will also be available for departmental seminars upon request.
- d) FCERA publishes a Comprehensive Annual Financial Report (CAFR) and a summary of the CAFR, known as Popular Annual Financial Report (PAFR), annually. This information is available to all members, active and retired, through email or direct mail and is available to the public on the FCERA website.
- e) Pertinent changes and information regarding the plan will be promptly distributed to affected members and posted to the website when appropriate.

4) Guidelines for materials for general distribution

- a) Materials will be reviewed for technical accuracy and legality by qualified persons including staff and/or legal counsel.
  - b) Trustees will be provided a copy of communication pieces when such pieces are distributed to members.
  - c) All communications material will meet the Policy Objectives.
- 5) Evaluation of Effectiveness

Members will be asked to evaluate the clarity and usefulness of the information received at orientation, workshops, seminars, counseling sessions or through FCERA's e-learning application. These evaluations will be used by management to improve the quality of programs.

#### **IV. Policy Review**

- 1) This policy will be reviewed at least every three years.

#### **V. Policy History**

- 1) This policy was first adopted on December 6, 2017 and updated on February 19, 2020.
- 2) This policy was last updated on February 19, 2020.

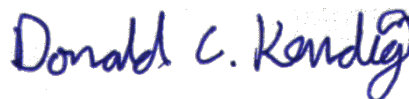
#### **VI. Secretary's Certificate**

I, Donald Kendig, the duly appointed Secretary of the Fresno County Employees' Retirement Association, hereby certify the adoption of this Policy.

February 19, 2020

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**Date of Action:**



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**By: Retirement Administrator**