



# Board of Retirement Regular Meeting

## Sacramento County Employees' Retirement System

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### Agenda Item 14

**MEETING DATE:** March 19, 2025

**SUBJECT:** Media and Legislative Relations Policy

**SUBMITTED FOR:**  X  Action          Information

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#### **RECOMMENDATION**

Approve new Media and Legislative Relations Policy.

#### **PURPOSE**

This item supports the Strategic Management Plan by maintaining transparent communications to stakeholders about roles and responsibilities.

#### **DISCUSSION**

At the January 2025 Board meeting, Staff presented a new policy that provides a framework for the Chief Executive Officer and members of the Board of Retirement to engage with the media and legislative stakeholders. It is intended to clarify and conform existing practices into a policy.

This version incorporates feedback from the Board provided at the January 2025 meeting. The policy aims to ensure consistent messaging and maintain the organization's reputation, while also recognizing the individual rights of Board members and the CEO to express personal opinions in their own capacity.

#### **ATTACHMENTS**

- Board Order
- Redlined version of policy with proposed changes
- Clean version of policy including proposed amendments

Prepared by:

/S/

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Eric Stern  
Chief Executive Officer



# Retirement Board Order

## Sacramento County Employees' Retirement System

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Before the Board of Retirement  
March 19, 2025

AGENDA ITEM:

### Media and Legislative Relations Policy

THE BOARD OF RETIREMENT hereby approves Staff's recommendation to approve new Media and Legislative Relations Policy.

I HEREBY CERTIFY that the above order was passed and adopted on March 19, 2025 by the following vote of the Board of Retirement, to wit:

AYES:

NOES:

ABSENT:

ABSTAIN:

ALTERNATES:

(Present but not voting)

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James Diepenbrock  
Board President

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Eric Stern  
Chief Executive Officer and  
Board Secretary



# MEDIA AND LEGISLATIVE RELATIONS POLICY

## PURPOSE

The purpose of this policy is to provide clear guidelines for SCERS Board members and ~~the Chief Executive Officer (CEO)~~ SCERS staff regarding interactions with the media and legislative bodies. The policy aims to ensure consistent messaging and maintain the organization's reputation, while also recognizing the individual rights of Board members and ~~the CEO staff~~ to express personal opinions in their own capacity.

## POLICY

### 1. Media Requests and Commenting on Behalf of the Organization

Board members and staff should refrain from commenting on matters related to SCERS or its activities with the media unless they have been formally designated to do so.

- In the event of a media request, board members and staff should promptly notify the Chief Executive Officer (CEO) or Public Information Officer (PIO). Board members and staff should defer to the organization's leadership to deliver timely and appropriate messaging.
- The CEO or PIO will coordinate, if appropriate, a statement on behalf of SCERS that is consistent with the organization's objectives, policies, and positions.
- The CEO will notify and confer with the Board President on media requests that may necessitate timely and appropriate messaging.

### 2. Legislative Relations and Public Policy Positions

The Board recognizes the importance of SCERS providing provide open, honest, and timely feedback to stakeholders and the policymaking community regarding issues or legislation in which SCERS or ~~the State Association of County Retirement Systems~~ an affiliated pension association may or may not have taken a formal position.

- The CEO is authorized to engage with legislators and stakeholders and participate in public policy discussions ~~on behalf of SCERS~~. This includes providing technical expertise, sharing organizational perspectives, and addressing issues that may require specialized knowledge or insight.
- While the CEO may provide input and technical expertise, only the Board is authorized to take formal positions on legislation that could impact the organization.

### 3. Confidentiality and Organizational Information

Board members and ~~the CEO staff~~ must not disclose confidential or proprietary information regarding the organization in media interactions or legislative

discussions. This includes, but is not limited to, financial information, internal strategies, personnel matters, and other sensitive data.

- If in doubt about whether information can be disclosed, Board members should consult with the CEO. Staff should consult with their SCERS supervisor.

#### 4. Speaking in a Personal Capacity

Notwithstanding Section 1 of this policy, Board members and ~~the CEO staff are free to may engage with the media, participate in policy discussions, and~~ participate in public forums in their personal capacity, provided that they make it clear they are speaking as individuals and not on behalf of SCERS, unless explicitly authorized to do so.

- When making public statements ~~or participating in media interviews~~, Board members and staff should explicitly state that their views are personal and do not represent the official position of SCERS.
- Board members should consult notify with the CEO ~~before when~~ advocating for or against specific legislation or public policy matters affecting SCERS. Any such advocacy should be conscious of the organization's strategic goals and priorities and respectful of the decisions, positions, and policies of the Board.
- The CEO shall keep the Board informed of legislative activity in which he or she is engaged on behalf of affiliated pension associations.
- Board members and ~~the CEO staff~~ should be mindful of the potential impact of their comments on the organization's public perception and ensure their personal statements do not conflict with the organization's mission, values, or objectives, or their fiduciary duty to all members of SCERS. It is important to remember that public statements, especially in relation to legislative or policy issues, can affect the organization's public image, and Board members and ~~the CEO staff~~ should always act in a manner that upholds the integrity and professionalism of the organization.

### RESPONSIBILITIES

Executive Owner: Chief Executive Officer

### POLICY HISTORY

Date	Description
<u>03-19-15-2025</u>	Board approved new policy



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