

## **Mission**

To deliver secure and competitive retirement plans through a professionally managed organization that anticipates diverse needs; provide quality services; and openly and effectively communicate with members, retirees, and cities.

## **Vision**

TMRS will be the preferred provider of competitive retirement benefits and excellent customer service by improving plan funding, investment return, communication, and education.

## **ACTIVE Principles**

- **Accountability** - We operate with transparency, learn from our mistakes, and accept responsibility for our actions.
- **Continuous Improvement** - We continually evaluate our operations and measure customer satisfaction to make our internal work processes and services better.
- **Teamwork** - We foster a collaborative, respectful environment and promote open communication among Board, staff, members, and cities.
- **Integrity** - We conduct our business and ourselves in an honest and ethical manner.
- **Versatility** - We proactively adapt and respond to our environment and the changing needs of our members and cities.
- **Employer of Choice** - We maintain a culture that recognizes the value of each employee; inspires creativity, mutual respect, and professionalism; and rewards employees for excellence.

TMRS Strategic Plan  
2015 – 2019  
As of December 4, 2015

**Goal 1. Ensure the financial stability and long-term viability of the Plan.**

<b>Objectives</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Objective 1. Examine current amortization policies and determine what adjustments, if any, would be beneficial.					
Objective 2. Prudently achieve portfolio diversification targets within an appropriate timeframe.					

**Goal 2. Continue to provide excellent customer service and communications to members, annuitants, employers, and other constituencies.**

<b>Objectives</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Objective 1. Continue to communicate the GASB-related changes to different stakeholders, explaining the differences between disclosures and funding.					
Objective 2. Develop strategies to increase electronic reporting of city payroll and electronic deposit of city and employee contributions.					
Objective 3. Expand delivery of self-service capabilities of MyTMRS and the City Portal.					
Objective 4. Implement the quality management framework developed by the internal auditor.					

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**Goal 3. Identify the best governance structure and establish a prudent policy framework for TMRS.**

<b>Objectives</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Objective 1. Enhance Board meeting productivity and efficiency.					
Objective 2. Evaluate the role of the Audit Committee and develop and implement a vision for the internal audit function.					
Objective 3. Revisit and optimize the role of the Advisory Committee on Retirement Matters.					
Objective 4. Create and implement a process for the Board to review the role of its current consultants.					
Objective 5. Design and implement an approach to support trustee orientation and continuing education.					
Objective 6. Enhance the transparency of the organization to external stakeholders.					
Objective 7. Discuss and document the desired performance evaluation process for the General Counsel and Internal Auditor positions.					

**Goal 4. Foster a culture within TMRS of open communication, where collaboration is encouraged and innovation is rewarded.**

<b>Objectives</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Objective 1. Develop a short-term (unexpected) and longer term (planned) succession plan for key positions.					
Objective 2. Create and implement a leadership development plan.					

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**Goal 5. Pursue a legislative agenda that supports the TMRS mission and vision.**

<b>Objectives</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>
Objective 1. Re-evaluate return to work provisions and determine what options exist for addressing member issues.					
Objective 2. Create a plan to address under what future circumstances TMRS would consider implementing gain sharing.					
Objective 3. Identify what legislative issues exist with the topics previously vetted by the Advisory Committee where no consensus was attained (i.e., COLAs, eligibility threshold).					
Objective 4. Develop and promote a legislative bill to clarify certain aspects of the TMRS Act.					