

WHEREAS CEO Roberto L. Peña started working for the City of San Jose in February 2013. In 2014 Retirement Department Services became the “Office of Retirement Services”, his title was changed to Chief Executive Officer, and now reported directly to the Retirement Board of Administration for Federated City Employees (FCERS) and Police and Fire Retirement Plan (P&F).

WHEREAS in 2013 CEO Peña worked with Granicus and Legistar for developing agendas and minutes.

WHEREAS in 2014 The Board hired a governance consultant. The Systems conducted a nationwide search for a CIO.

WHEREAS in 2015 Under the direction of the CEO the Office of Retirement Services, continued to develop.

WHEREAS in 2016-2017 The Investment Program continued, and both plans held annual stake holder’s meetings. The CIO retired.

WHEREAS in 2018 CEO Peña and both plans hired a new Chief Investment Officer (CIO).

WHEREAS in 2019 The CEO implemented a new PAS which went live in February.

WHEREAS in 2020-2021 The CEO and both Boards led a Strategic Communications Plan that encompasses social media and other communications needs of the ORS.

WHEREAS in 2022-2023 the Investment Program continued to manage portfolio investments.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF ADMINISTRATION FEDERATED CITY EMPLOYEES, OF THE CITY OF SAN JOSE:

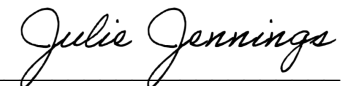
That the Board of Administration extends its thanks to Roberto L. Peña for his dedicated years of service to the Federated City Employees Retirement Department Plan, and for his adherence to high standards of quality, ethics, and integrity for this Board and for his performance of valued service.

Throughout Roberto’s 11+ years, Roberto supported ORS staff and highly encouraged Employee Recognition Programs and activities.



Spencer Horowitz

Board of Administration



Julie Jennings

Board of Administration

Presented this 20th day of June 2024 by the following:

AYES: Abbott, Avasty, Chandra, Faulkner, Linder