CITY OF SAN JOSE
CAPITAL OF SILICON VALLEY

Memorandum

TO: Boards of Administration
Joint Personnel Committee

FROM: John Flynn, CEO

SUBJECT: Communications Function Assessment
Vision'31 Initiative 5.2.2

DATE: August 31, 2026

Approved | Date

RECOMMENDATION

Discussion and action to provide direction to the staff on the Communications Function Assessment.

BACKGROUND

Vision'31 Initiative 5.2.2, approved through the Strategic Plan and FY2027 Annual Strategic Work Plan, calls for ORS to establish a defined communications function based on the capacity assessment recommendation. The Action Plan leaves the operating model, whether a new position, restructured role, or managed arrangement, to this analysis and targets December 2027 for the completed function. Expanded member communications and retirement education are intentionally sequenced after this capacity is established.

ORS currently delivers communications through Deputy Director ownership, subject matter and technical staff, and specialized external providers for social media management, newsletter writing, crisis communications availability, and graphic design. Administration, Benefits, IT, executive leadership, investment staff, and other subject matter owners contribute within their responsibilities. This model has effectively supported the limited communications activities ORS has historically prioritized.

Vision'31 commits ORS to a materially larger body of communications work than the current model was built to deliver, including member engagement, a structured retirement education program beyond the pre-retirement workshops currently offered, additional communication channels, accessible-by-design production, website content governance and analytics, communications goals and measurement, enterprise communications, and structured trustee onboarding support. The assessment therefore focuses on the organizational capacity needed to deliver that work while preserving existing subject matter, technical, and executive oversight. Appendix A summarizes the workload and dependencies.

ANALYSIS:

Strategic Capacity Requirement

Current communications work is distributed across staff whose primary responsibilities are in other functions and providers with defined task-specific scopes. Vision'31 adds recurring program responsibilities requiring planning, production, measurement, and coordination. A dedicated communications professional provides standing capacity for this work while the Deputy Director retains executive ownership of the program.

Under the recommended structure, subject matter owners retain responsibility for the accuracy and substance of their areas. IT retains technical website administration, security, integrations, enhancements, and technical vendor coordination. The communications professional manages day-to-day content, editorial standards, design, channels, production, accessibility from creation, analytics, program measurement, and communications vendor coordination. Appendix D provides the responsibility framework.

Peer Benchmark

Staff reviewed seven California public retirement system peers. Four use a dedicated internal communications function, one assigns communications to a broader internal role, and two combine internal accountability with supplemental external support. Five of seven identify a communications-specific internal title, and all seven maintain internal accountability. Staff did not identify a fully outsourced peer model without internal accountability. Reporting lines generally place the function within executive administration, operations, or member services. The benchmark supports an embedded ORS professional with specialized external resources where they add value. Appendix B provides the peer detail.

Classification and Organizational Placement

Staff recommends the City classification Public Information Representative, Senior, job code 6338. The classification supports service as a senior individual contributor under a senior departmental manager and encompasses strategic communications planning, program management and evaluation, media relations, website and social media management, survey research, public engagement, content production, and oversight of consultants and contractors. Public Information Representative I and II are designed for work below the anticipated program-building scope, while Public Information Manager is oriented toward broader supervisory responsibilities than this initial single-position model requires.

One Public Information Representative, Senior, represents the appropriate initial staffing level for establishing the function. As the communications program matures, demonstrated workload, service expectations, and program measures will provide the basis for evaluating whether additional internal capacity or specialized external support would add value through future budget processes.

The position would report to the Deputy Director as an enterprise resource. This placement maintains the Deputy Director's executive ownership of the communications program and

positions the role to serve both retirement systems and all ORS divisions. Appendix D compares the Public Information series and describes the proposed responsibility boundaries.

Cost-Benefit Analysis

Using 40% benefits loading assumption for planning purposes, the estimated annual loaded personnel cost is $182,661 to $222,532. Current FY2027 social media management, newsletter writing, and crisis communications contracts total $64,360 and are the clearest recurring expenditures expected to transfer after the employee is onboarded and the work is transitioned. Applying those transfers produces an illustrative incremental loaded annual cost of $118,301 to $158,172.

Cost element	Annual amount	Planning treatment
Public Information Representative, Senior	$182,661 to $222,532	Salary range plus 40% planning load
Recurring contracts expected to transfer	$64,360	Social media plus newsletter writing and crisis communications
Incremental Budget Impact	$118,301 to $158,172	Loaded personnel cost less identified recurring transfers

The cost analysis includes only recurring expenditures that are expected to transfer. Newsletter graphic design may partially transfer based on the employee's production capabilities and is excluded from the offset. Website technical services, printing and mailing, translation, complex accessibility remediation, advanced design, video, major campaigns, and surge support remain available as needed. Approximately 96 hours of annual Deputy Director and administrative newsletter coordination represents returned organizational capacity rather than a cash savings.

The benefit is broader than the services represented by the transferred contracts. The position would provide standing professional capacity for the recurring Vision'31 workload, including program management and measurement, member engagement, retirement education production support, website content governance, enterprise communications, accessible production, and coordination of specialized resources. Appendix C provides the cost and operating model detail.

Requested Direction and Next Steps

With the Committee's direction, staff will work with the City to confirm the classification path and bring a proposed personnel and budget request through the FY2028 budget process. Communications services would continue during recruitment and onboarding; the current social media contract runs through June 30, 2027, and may require a bridge or short extension. If the Committee requests additional analysis, staff will address the specific questions identified and return to the November Joint Personnel Committee meeting.

CONCLUSION

Based on the Vision'31 workload, peer benchmark, operating model analysis, and cost-benefit analysis, staff recommends establishing the core communications function through one Public

Information Representative, Senior, Job Code 6338, reporting directly to the Deputy Director. The position would serve all ORS divisions as an enterprise communications professional.

Staff requests that the Committee take one of the following actions:

- Support the recommendation and direct staff to work with the City to develop the proposed FY2028 personnel and budget request; or

- Identify the specific additional analysis needed and direct staff to return at the November Joint Personnel Committee meeting.

John Flynn
Chief Executive Officer (CEO)

Appendix A: Vision'31 Workload and Capacity Dependencies

The Deputy Director owns and manages the ORS communications program as one responsibility within a broader range of executive priorities. She also serves as the ORS Language Access Liaison and Racial and Social Equity Liaison. Administrative staff coordinates newsletter production. Benefits staff develop and validate member benefit content. IT manages routine website updates and coordinates with the website vendor. The CEO, CIO, and other subject matter staff develop and approve content within their respective areas.

Three external providers support isolated communication components. A social media consultant manages about three posts per week, including graphics, scheduling, publishing, and follower development, for an FY2027 estimated cost of $43,200. A newsletter consultant writes articles for the quarterly newsletter and remains available for crisis communications, for an FY2027 estimated cost of $21,160; the crisis communications component has not been used since FY2024 apart from a limited number of additional assignments. A separate vendor produces the newsletter's graphic design and layout, estimated at $4,089 for the 2026 calendar year. Deputy Director and administrative staff time devoted to newsletter coordination totals approximately 96 hours annually. This model has effectively supported the limited communications activities ORS has historically prioritized.

Vision'31 Workload

Vision'31 and the Action Plan commit ORS to a materially larger and more specialized body of communications work, including:

SI	Strategic work	Capacity implication
2.4.1	Membership Voice Survey	Member preferences inform communications goals, channels, retirement education, and related member experience work.
3.1.1	Define communications goals, metrics, and management structure	Establishes the program plan, accountability structure, current activity inventory, and baseline measurements under Deputy Director ownership.
5.2.2	Establish a defined communications function	Requires a capacity assessment to determine the operating model, ownership, scope, budget, and accountability needed to make the function operational.
2.3.1	Structured retirement education by career stage	Expands beyond the six annual pre-retirement workshops into structured career-stage education and requires communications and delivery infrastructure. The Action Plan identifies 5.2.2 as a hard dependency.
3.2.1	Expand and modernize member and retiree communications	Adds new formats or channels, brand standards, accessible-by-design materials, and engagement measurement. The Action Plan identifies the communications function as required capacity.
6.1.1	Structured trustee onboarding program	Creates a more substantive onboarding program and materials. The Action Plan identifies this initiative as a primary downstream beneficiary of the communications function.

Sources: Vision'31 Strategic Plan, FY2027 Annual Work Plan, and ORS Strategic Plan Action Plan, June 2026.

Appendix B: Formal Peer Benchmark

Staff reviewed seven California public retirement systems using public organization charts, budgets, salary schedules, class specifications, recruitments, Board materials, annual reports, policies, and agency websites. ORS is the baseline and is excluded from the peer counts.

Operating model	Peer count
Dedicated internal communications function	4
Communications responsibility in a broader internal role	1
Internal accountability with supplemental external support	2

Five of seven peers identify a communications-specific internal job title. All seven maintain internal accountability for the communications program. External support appears as supplemental capacity within several peer structures. Staff did not identify a formal peer operating a fully outsourced communications program without internal accountability.

Peer	Model	Internal role or accountability	Public salary range identified
CCCERA	Dedicated internal	Communications Coordinator through Member Services	$114,036 to $138,600
VCERA	Dedicated internal	Communications Officer reporting to Chief Operations Officer	$98,306 to $159,993 across possible II and III levels
FCERA	Dedicated internal	Communications Analyst in Communications Unit	Current official range unavailable in public sources
SJCERA	Dedicated internal	Communications Officer, Management Analyst II	$85,150 to $103,501
SamCERA	Internal plus supplemental support	Retirement Communication Specialist plus external support	$117,229 to $146,557
SCERA	Broader internal role	Department Analyst with communications and outreach portfolio	$99,222 to $120,615
SBCERS	Internal plus supplemental support	CEO accountability with work distributed across internal roles and providers	Multiple internal roles; vendor costs unavailable in public sources

Source: Salary ranges are classification or recruitment ranges and differ in scope and effective date.

Appendix C: Operating Model and Cost-Benefit Detail

This appendix compares what ORS receives under the current distributed model with what dedicated internal capacity would provide, and presents the associated cost detail.

Dimension	Current structure	Recommended structure
Program delivery	Deputy Director owns the program. Day-to-day work and institutional knowledge are distributed among ORS staff and task-specific providers.	Deputy Director retains executive ownership. Public Information Representative, Senior manages day-to-day execution, consolidates program knowledge, and provides direct capacity for routine and time-sensitive needs.
Core recurring work	Current vendors provide defined social media, newsletter writing, and design services. Other communications work is performed across existing ORS roles.	Core recurring communications production and program management move to the dedicated internal professional after onboarding.
Specialized resources	Technical website services and project-specific professional services are retained as needed.	Specialized resources remain available for technical web work, translation, complex accessibility, advanced design, video, campaigns, and surge capacity.

Current Cost Detail

Resource or service	Current cost or resource	Recommended treatment
Social media management	Approx. three posts/week/system; $43,200 FY2027	Transfer after onboarding and orderly handoff.
Newsletter writing and crisis communications	$21,160 FY2027	Transfer after sufficient organizational onboarding.
Newsletter graphic design and layout	$4,089 CY2026 estimate	Routine production may transfer based on demonstrated capability. No offset assumed.
Continuing and specialized services	Website vendor; $786 FY2027 printing and mailing estimate; project-specific services	Continue based on need, including technical web, translation, complex accessibility, advanced design, video, campaigns, and surge support.
Deputy Director and administrative newsletter time	Approximately 96 hours annually	Return capacity to executive. Administrative work may continue as needed.

Loaded Personnel Cost

Cost element	Annual amount	Treatment
Public Information Representative, Senior salary	$130,472 to $158,952	Current City total annual range
Estimated loaded personnel cost	$182,661 to $222,532	Salary plus 40% benefit load
Recurring contracts expected to transfer	$64,360	Social media plus newsletter writing and crisis communications
Illustrative incremental loaded cost	$118,301 to $158,172	Loaded personnel cost less identified recurring transfers

Appendix D: Classification, Placement, and Responsibility Framework

City Public Information Series	Job code	Current annual range	ORS decision reading
Public Information Representative I	4231	$88,015 to $107,103	Entry level in the series; does not reflect the required program-building responsibility.
Public Information Representative II	4234	$97,144 to $118,067	Journey level for established projects and campaigns; below the anticipated scope and autonomy.
Public Information Representative, Senior	6338	$130,472 to $158,952	**Recommended**. Senior individual contributor capable of establishing and initially operating the ORS communications function.
Public Information Manager	1675	$161,555 to $197,737	Management classification with a broader supervisory profile than the proposed single-position model.

The Public Information Representative, Senior classification can serve as an individual contributor under a senior departmental manager. Its specification covers strategic communications planning, program management and evaluation, media relations, website and social media management, surveys, public engagement, production, and oversight of consultants and contractors.

Staff recommends that the position report to the Deputy Director as an enterprise ORS resource serving both retirement systems and all ORS divisions, consistent with the Deputy Director's current program ownership.

Proposed Responsibility Framework

Area	Retained executive, subject matter, or technical ownership	Communications professional
Communications program	Deputy Director retains executive direction and priorities.	Day-to-day program management, calendar, standards, production, measurement, and vendor coordination.
Member benefit communications	Benefits retains benefit accuracy, policy interpretation, and operational decisions.	Readability, organization, design, channel, production, accessibility, and measurement.
Investment communications	CIO and investment staff retain analysis, recommendations, execution, and direct Board reporting.	Editing, presentation structure, visual design, accessibility, and audience adaptation.
Website	IT retains technical administration, security, integrations, enhancements, and technical vendor coordination.	Content strategy, editorial standards, routine content governance, design priorities, analytics, and accessibility from creation.
Governance, executive, and City communications	CEO, CIO, and other subject matter owners retain substantive authority.	Editing, presentation, audience adaptation, logistics, communications planning, and production support.
Specialized communications	Executive owner determines scope and procurement.	Coordinates translation, complex accessibility remediation, advanced design, video, campaigns, and surge support.