

Enterprise Operations Map (EOM) - High Level View (FY 2019-20) - Status as of 3/31/2020 - Quarter 3

VISION: A respected partner, providing a sustainable retirement system and health care program for those who serve California

MISSION: Deliver retirement and health care benefits to members and the ir beneficiaries

CORE VALUES: Quality, Respect, Accountability, Integrity, Openness, Balance

Operational Outcome Measures	 RELIABLE STEWARD OF FUNDS Michael Cohen			 CUSTOMER SATISFACTION DRIVEN ORGANIZATION Anthony Suine		 OPEN & TRANSPARENT COMMUNICATION Brad Pacheco			 EFFICIENT & EFFECTIVE ORGANIZATION Doug Hoffner			 SUPPORTIVE & ENGAGED LEADERSHIP Yu (Ben) Meng	 TEAM MEMBER ENGAGEMENT Donald Moulds	
Core Processes	Accounting for Funds <i>Michael Cohen</i>	Managing Investments <i>Yu (Ben) Meng</i>	Projecting Liabilities <i>Scott Terando</i>	Provide & Administer Retirement Benefits <i>Anthony Suine</i>	Provide & Administer Health Care Benefits <i>Donald Moulds</i>	Educate Members, Employers & Stakeholders <i>Brad Pacheco</i>	Listening & Informing <i>Brad Pacheco</i>	Brand Reputation <i>Brad Pacheco</i>	Leveraging Technology <i>Doug Hoffner</i>	Compliance & Managing Risks <i>Marlene Timberlake D'Adamo</i>	Purchasing & Acquisition <i>Doug Hoffner</i>	Managing Resources & Performance <i>Doug Hoffner</i>	Attracting & Supporting Team Members <i>Doug Hoffner</i>	
Key Performance Indicators (KPI)	GASB 68 reports completed timely † Produce CAFR with no material weaknesses † % forecast to actual expenses (annually) * Maintain appropriate reserve levels - CERBT fund Maintain appropriate reserve levels - long-term care fund Maintain appropriate reserve levels - defined benefit funds	Stay within risk boundaries for total fund * Aggregate risk levels of the INVO operating model (TOM) * Strategic asset allocation ranges (if outside approved ranges) * Adequate liquidity coverage Cash forecasting accuracy	Generate liability data and rates for pension funding - public agency * Generate liability data for long-term care program Generate liability data and rates for pension funding - state * Generate liability data and rates for pension funding - schools *	Customer satisfaction Benefit payment accuracy Benefit payment timeliness	Health plan scorecard of 90% or better * Customer inquiry timeliness * Rating of health care * Public agency retention Public agency recruitment	% of employer participation in CalPERS annual educational forum * Member education satisfaction Employer education satisfaction	Member rating on stakeholder perception survey * Employer rating on stakeholder perception survey * Stakeholder rating on stakeholder perception survey * Community outreach efforts *	Member, employer & stakeholder rating on perception survey *	Project portfolio health Timely resolution of public agency reviews Form 700 completed timely * Mandated training compliance * Personal trading monitoring * Ensure evacuation readiness * Business continuity readiness † Cyber security risk rating (Closed Session) Lean adoption Employers current on CalPERS health obligations Employers current on CalPERS pension obligations	Small business requirements compliance * Disabled veterans business enterprise requirements compliance * Solicitation, contract, amendment, & purchase order service level compliance *	Team member perception of leadership-team leader relationships * Retain highly skilled senior leaders † Health of enterprise performance reporting framework * Operational sustainability report †	Average time to hire for hard-to-recruit positions * Retention rate † Rewards & recognition perceptions * Work life balance perceptions * Team member perception of training and development * Response rate of employee engagement survey * Emerging leader program † 100% of all ideas responded to within 120 days 80% of all viable ideas implemented as scheduled Our Promise and annual food drive †		
Legend	† Denotes Informational KPIs * Pending Refresh On-Target At-Risk Off-Target													