

# 2012-2017 CalPERS Strategic Plan

## Follow-up to the May 16 Session on Mission and Vision



# Vision Options

Ranked by Total Votes of Board and Executive Staff

## Option 1 – 80%:

A trusted leader respected by our members and stakeholders for integrity, innovation, and service

## Option 2 – 20%:

A trusted and respected leader in retirement and health security focused on serving our members and stakeholders

## Option 3 – 0%:

An innovative leader trusted to provide retirement and health security, respected for our integrity, and dedicated to serving our members and stakeholders

# Mission Options

Ranked by Total Votes of Board and Executive Staff

## Option 1 - 62%:

Provide responsible and efficient stewardship of the System to deliver promised retirement and health benefits, while fostering wellness and promoting retirement security for members and beneficiaries

## Option 2 - 38%:

Provide responsible and efficient stewardship of the System to deliver promised retirement and health benefits, while promoting retirement security and wellness for members and beneficiaries

# Draft Vision, Mission, and Goals

***Top Ranked Vision:*** A trusted leader respected by our members and stakeholders for integrity, innovation, and service

***Top Ranked Mission:*** Provide responsible and efficient stewardship of the System to deliver promised retirement and health benefits, while fostering wellness and promoting retirement security for members and beneficiaries

<b>A</b> <i>System Strength</i>	<b>B</b> <i>Organization &amp; Culture</i>	<b>C</b> <i>Identity &amp; Public Policy</i>
<p><b><i>Improve long term pension and health benefit sustainability</i></b></p> <p><u>Objectives</u></p> <ul style="list-style-type: none"><li>• Manage an integrated view of pension assets and liabilities</li><li>• Set sustainable pension funding requirements</li><li>• Deliver target risk adjusted investment returns in a changing environment</li><li>• Ensure high quality, accessible, affordable health benefits</li><li>• Create a culture of wellness among members and employers</li></ul>	<p><b><i>Cultivate a high performing, risk intelligent, and innovative organization</i></b></p> <p><u>Objectives</u></p> <ul style="list-style-type: none"><li>• Use a focused approach to generate new ideas, test, refine, and put into practice</li><li>• Deliver quality end-to-end customer service that responds to changing customer needs</li><li>• Recruit, retain, develop, and empower a broad range of talents against organizational priorities</li><li>• Actively manage business risks with an enterprise-wide view</li></ul>	<p><b><i>Engage in state and national policy development to enhance the long term sustainability and effectiveness of our programs</i></b></p> <p><u>Objectives</u></p> <ul style="list-style-type: none"><li>• Define CalPERS perspective on pension, health, and financial markets</li><li>• Provide education and engagement opportunities for a variety of stakeholders</li><li>• Work with others to shape policy agenda and expand impact</li></ul>

