

# Board Governance Project

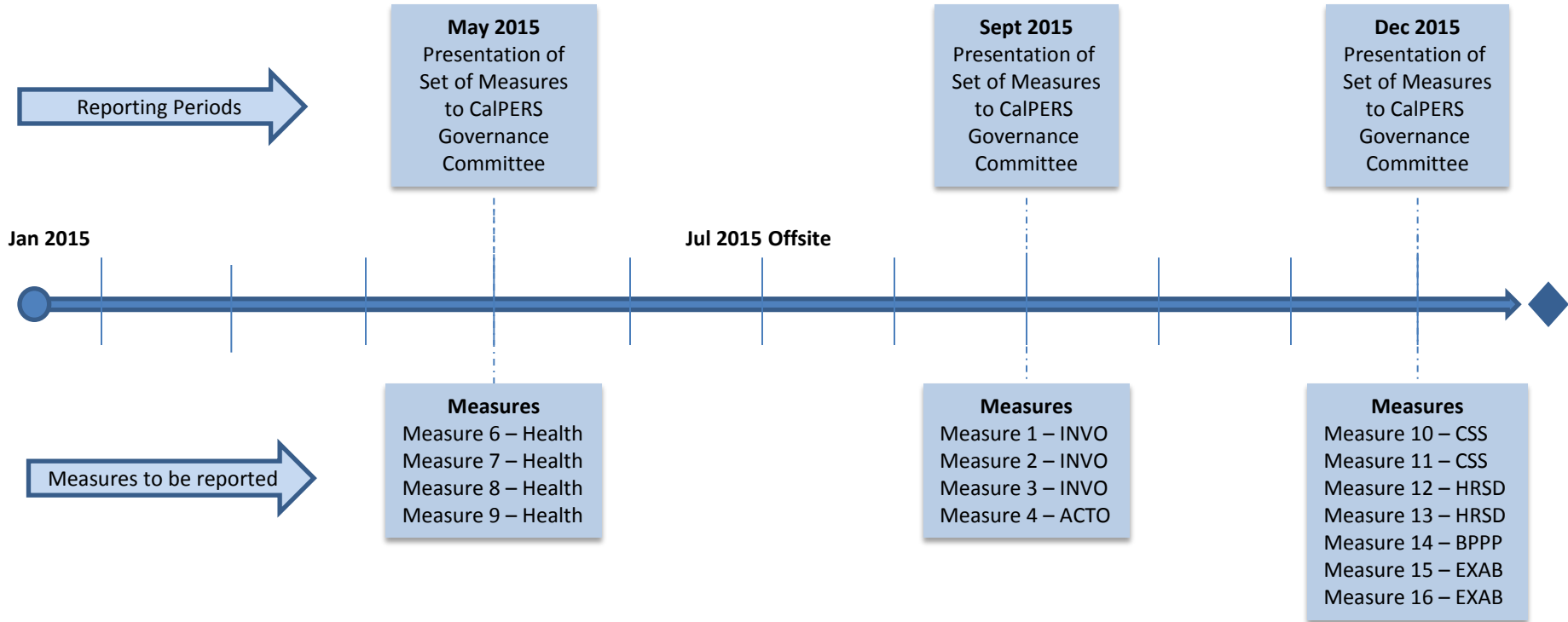
## Update on Strategic Measures

Douglas Hoffner  
Deputy Executive Officer  
Operations and Technology

# Agenda

- Strategic Measures Project Overview
  - Suite of measures presented in July 2015
- Project Activity
  - Offsite incorporations/considerations
  - Data analytics and validation
  - Strategic Measures Display Tool
- Project Schedule

## Strategic Measures Board Reporting Schedule 2015



◆ In 2016, a strategic analysis and metric roll up to goal level will take place and be reported to Governance Committee. There will be ongoing access to each measure displayed on the tool throughout the year.

# Strategic Measure 10

## Benefit Payments

Anthony Suine  
Benefit Services Division

## Metric Profiles

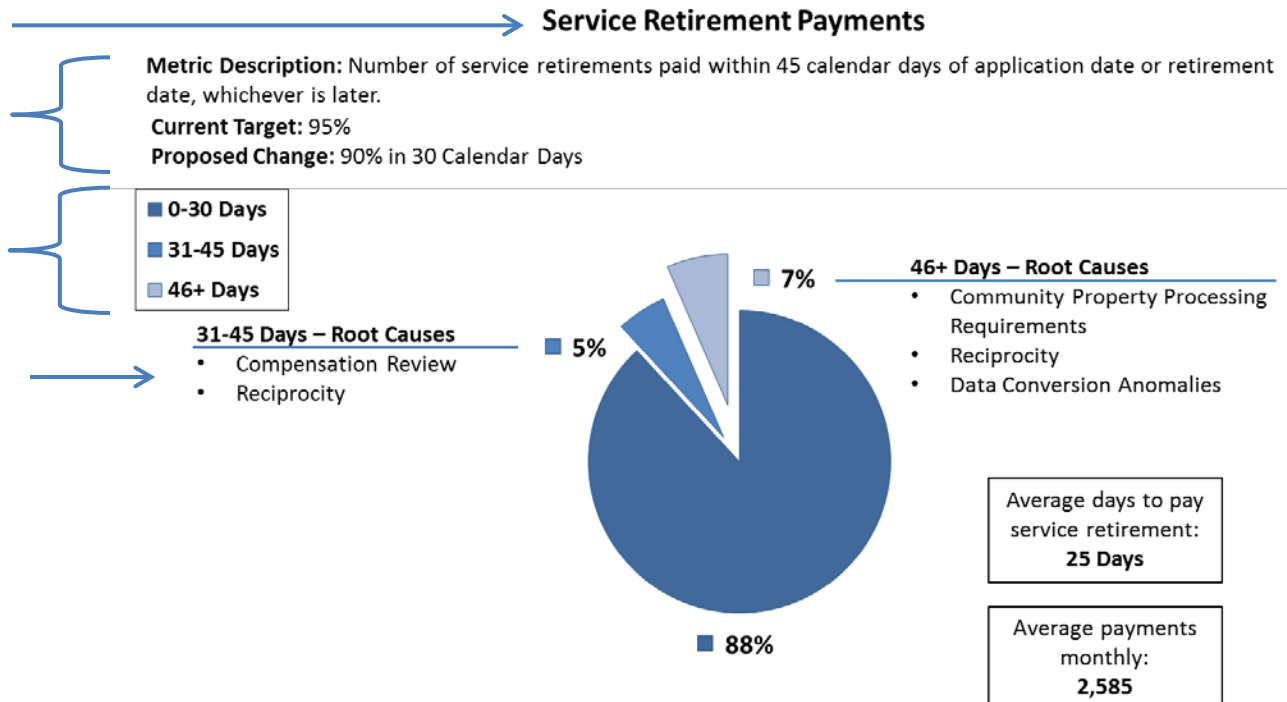
**Metric Profiles** contain the description and target for each benefit payment in Strategic Measure 10. The data presented represents Fiscal Year 2013-2014. Each benefit payment will be accompanied by a chart breaking down processes into specific timeframes. A root cause analysis was conducted for cases that fall outside of the 30 day processing timeframes. Below is a key for the metric profiles.

### Benefit Payment Type

### Description and Target of Metric

### Chart Legend for Processing Timeframe Groups

### Root Cause Analysis Key Findings

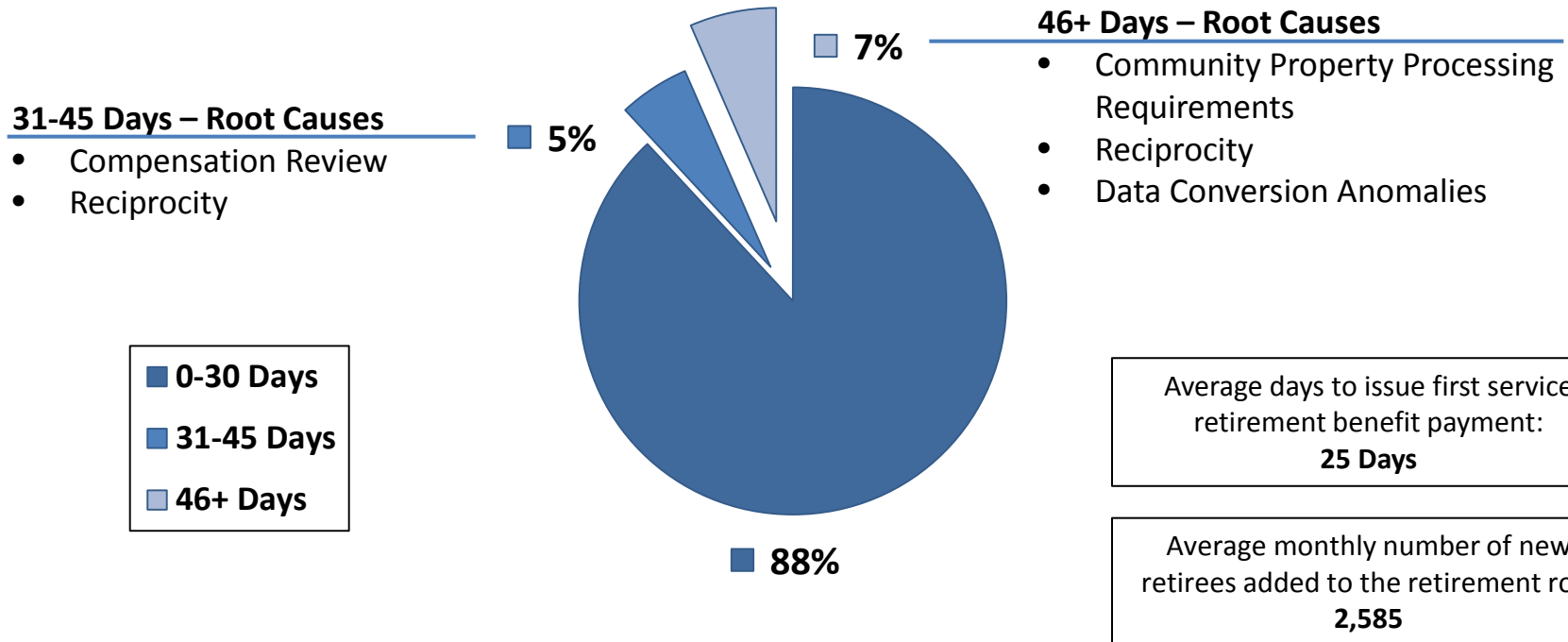


## Service Retirement Payments

**Metric Description:** Number of service retirements paid within 45 calendar days of retirement date.

**Current Target:** 95%

**Revised Target:** 90% within 30 Calendar Days

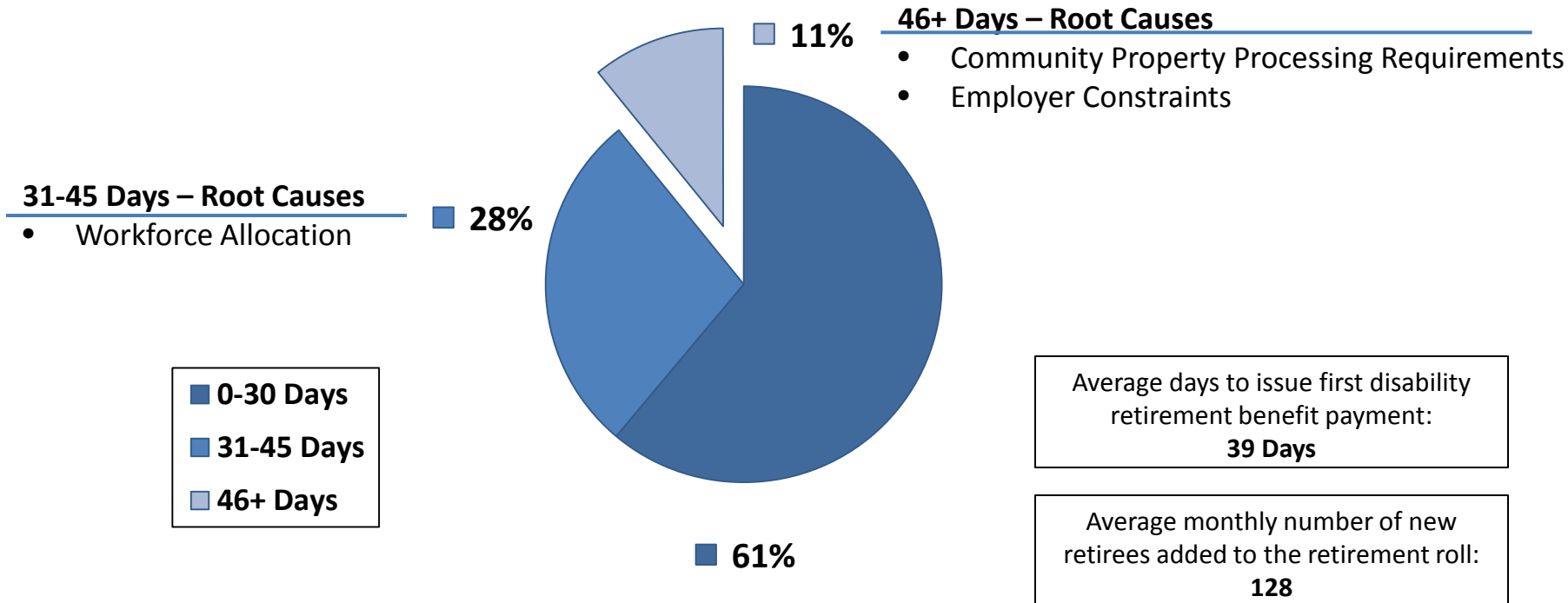


## Disability Retirement Payment

**Metric Description:** Number of first disability payments issued within 45 calendar days of retirement date or disability determination date, whichever is later.

**Current Target:** 90%

**Revised Target:** 90% in 30 Calendar Days



## Refunds

**Metric Description:** Number of first refund payments issued within 30 calendar days of an election.

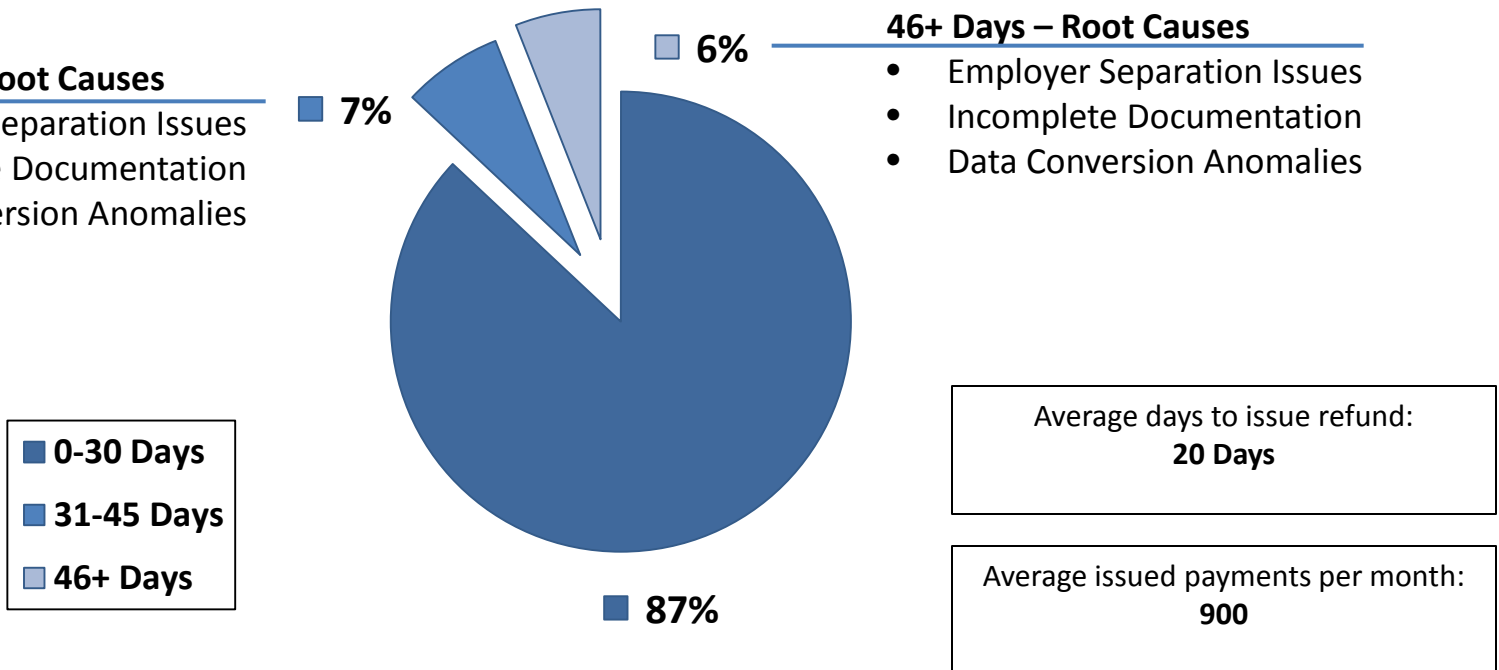
**Current Target:** 98%

### 31-45 Days – Root Causes

- Employer Separation Issues
- Incomplete Documentation
- Data Conversion Anomalies

### 46+ Days – Root Causes

- Employer Separation Issues
- Incomplete Documentation
- Data Conversion Anomalies



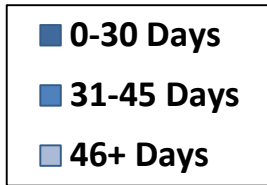


## Pre-Retirement Death Benefit Payments

**Metric Description:** Number of payments issued within 45 calendar days of receipt of required documentation.

**Current Target:** 100%\*

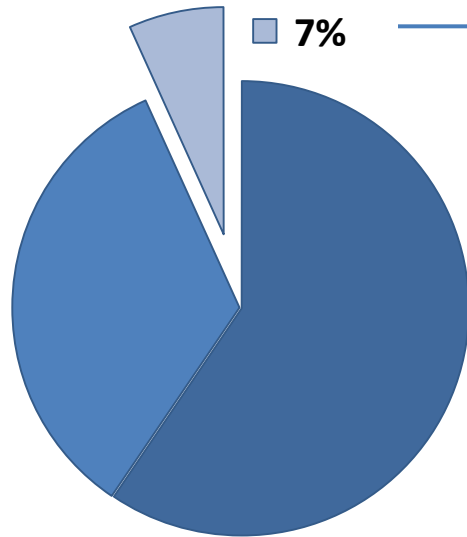
\*Per Government Code 21499 penalty interest begins to accrue after 45 days.



### 31-45 Days – Root Causes

- Workforce Allocation
- Complex cases (i.e., Pre v. Post, Community Property, Safety)
- Outstanding Work Items (Service Credit Purchasing, Compensation Review, Employer Data)

■ 34%



■ 59%

### 46+ Days – Root Causes

- Complex cases (i.e., Pre v. Post, Community Property, Safety)
- Data Conversion Anomalies
- Outstanding Work Items (Service Credit Purchasing, Compensation Review)

Average days to issue pre-retirement death benefit payment:  
**41 Days**

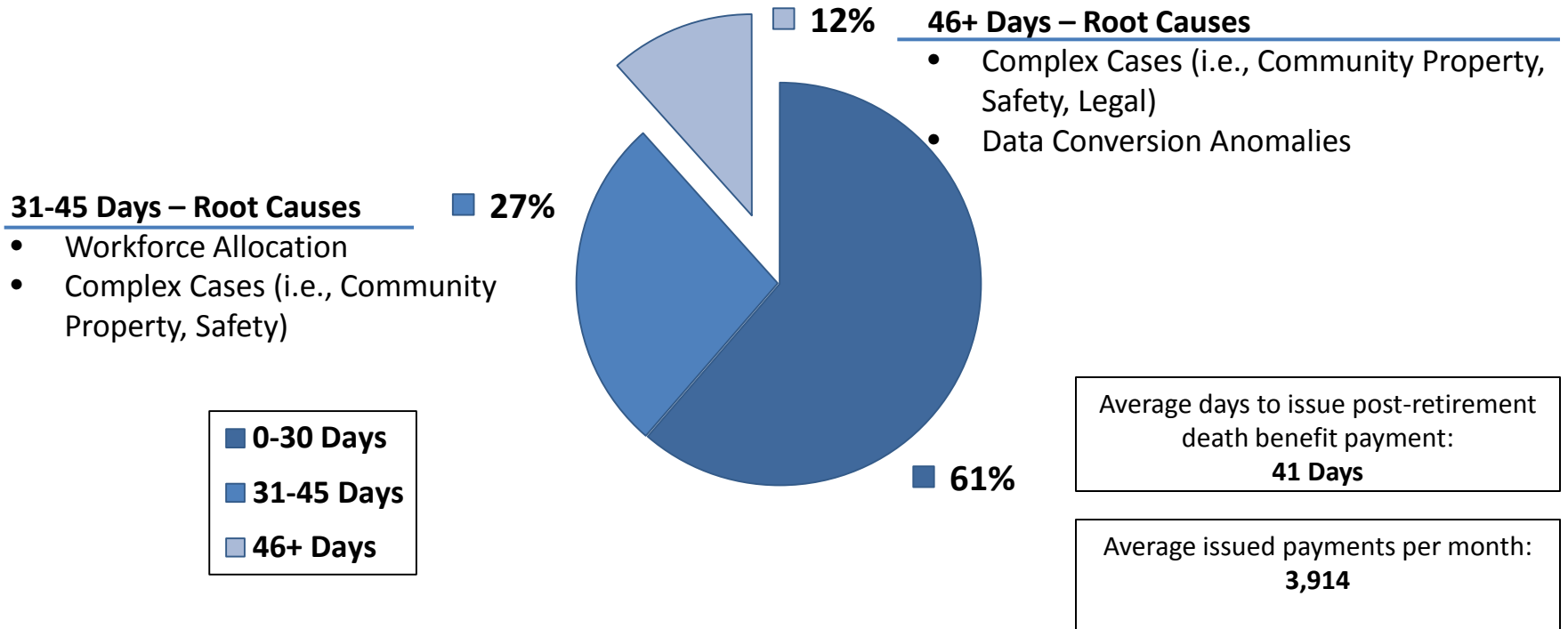
Average issued payments per month:  
**306**

## Post-Retirement Death Benefit Payment

**Metric Description:** Number of payments issued within 45 calendar days of receipt of required documentation.

**Current Target:** 100%\*

\*Per Government Code 21499 penalty interest begins to accrue after 45 days.



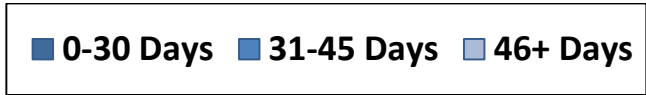
## Proposed Death Benefits Metrics: Ongoing Payments

### Proposed Metric Description:

Number of monthly, on-going payments issued within 45 calendar days of receipt of death notification.

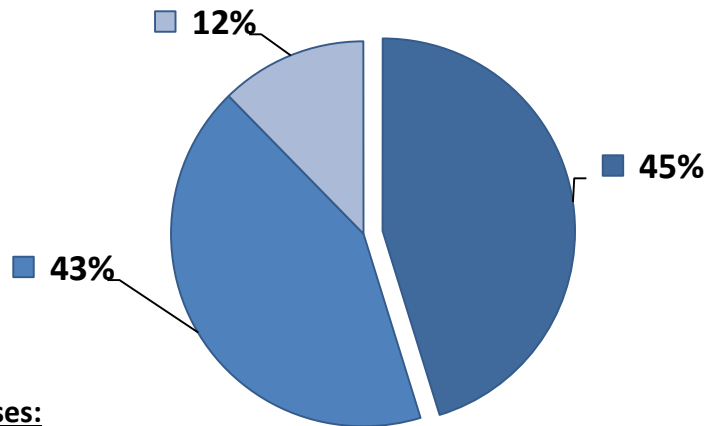
**Revised Target:** 100%\* in 45 Calendar Days

\*Per Government Code 21499 penalty interest begins to accrue after 45 days.



### Pre-Retirement Death Benefits

Total number of payments issued FY 2013-2014: 219

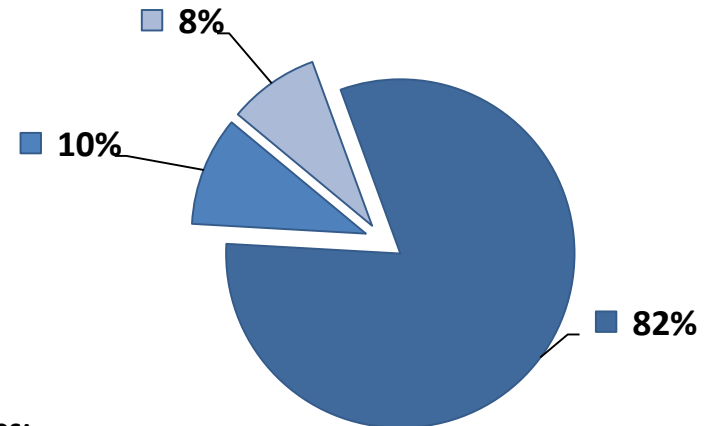


#### Root Causes:

- Complex cases and benefit payment calculations (Pre vs Post)
- Outstanding work items (Service Credit Purchases, Employer Data, Compensation Review)

### Post-Retirement Death Benefits

Total number of payments issued FY 2013-2014: 4,286



#### Root Causes:

- Complex Cases (Community Property, Safety)

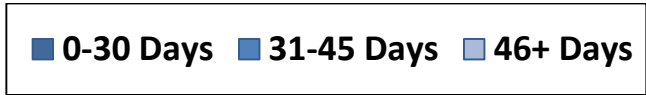
## Proposed Death Benefits Metrics: Lump Sum Payments

### Proposed Metric Description:

Number of lump sum payments issued within 45 calendar days of receipt of required documentation.

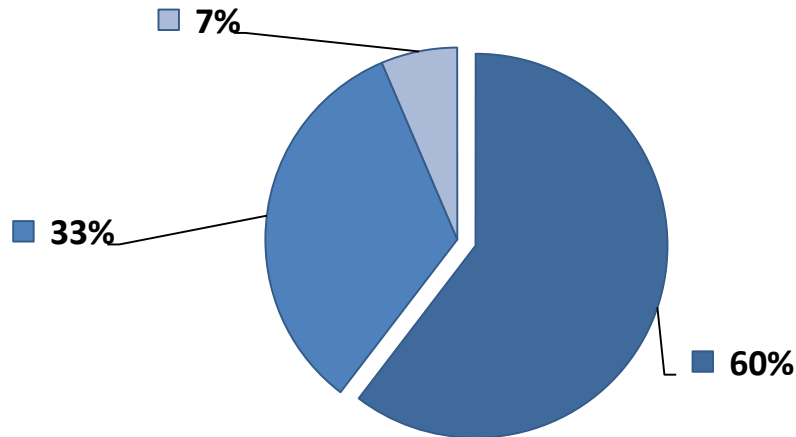
**Revised Target:** 100%\* in 45 Calendar Days

\*Per Government Code 21499 penalty interest begins to accrue after 45 days.



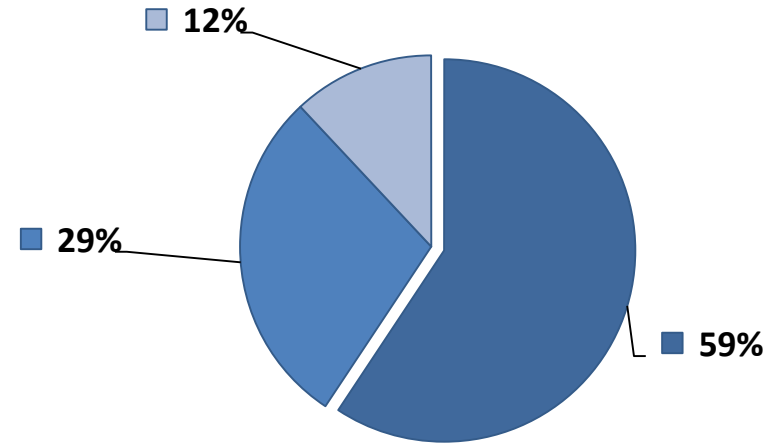
### Pre-Retirement Death Benefits

Total number of payments issued FY 2013-2014: 3,459



### Post-Retirement Death Benefits

Total number of payments issued FY 2013-2014: 42,786



#### Root Causes:

- Complex Cases (Pre vs Post, Community Property, Safety)
- Outstanding work items (Service Credit Purchases, Employer Data, Compensation Review)

#### Root Causes:

- Complex Cases (Community Property, Safety)