

Retirement Research & Planning Division Research Agenda

Strategies		Initiatives	Descriptions
	CalPERS Membership	Retirement Readiness	Survey CalPERS members' to assess retirement readiness.
		Financial Literacy	Identify strategies to improve CalPERS members' financial literacy.
		Demographic and Geographic Analysis	Analyze demographic and geographic make-up of CalPERS membership to understand variations in retirement trends, retirement readiness and adequacy, economic impacts, and regional office accessibility.
		Retirement Trends	Quantify retirement trends to assist CalPERS in assessing workforce and resource allocation needs in the near and long-term.
		Retirement Adequacy	Identify best practices for defining and measuring retirement adequacy and assess the adequacy of CalPERS benefits against these measures.
	Insight and Innovation	Employer and Employee Needs	Identify strategies to balance employer and employee needs.
		Other Post-Employment Benefits (OPEB) Liability Funding Models	Explore models to fund other post-employment benefits (OPEB) liabilities.
		Supplemental Income Plan (SIP) Participant Trends	Analyze SIP investments trends to understand factors that influence participant decisions.
	Sustainability	Intergenerational Equity	Identify strategies to support intergenerational equity.
		Funding Status	Analyze factors that impact funding status to further educate stakeholders about pension funding.
		Public Pension System Sustainability	Research best practices related to pension sustainability.
		Economic Impacts	Analyze the economic impacts of defined benefit payments in California.
	Policy Recommendations	Consistency	Explore opportunities to address retirement issues and improve retirement policy.
		Retirement Security	Identify and support local, statewide, and national policy efforts to promote retirement security.
		System Simplification	Identify opportunities to improve and simplify current system methods and practices.

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Identify potential opportunities for innovations

CalPERS Membership

Retirement Readiness

Financial Literacy

Demographics and
Geographic Analysis

Retirement Trends

Retirement Adequacy

Insight and Innovation

Employer and
Employee Needs

Other Post- Employment
Benefits (OPEB) Liability
Funding Models

Supplemental Income Plan
(SIP) Participant Trends

Pension Beliefs

Enterprise-wide collaboration

**Goal C: Engage in state and national policy development
to enhance the long-term
sustainability and effectiveness of our programs**

Intergenerational Equity

Funding Status

Public Pension
System Sustainability

Economic Impacts

Sustainability

Consistency

System Simplification

Retirement Security

Policy Recommendations

Identify and support best practices and policies that promote retirement security