

2017-22 Operational Measures | Key Performance Indicator Summary*

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 their beneficiaries

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

Operational Outcome Measure: Customer Satisfaction Driven Organization

Owner: Donna Lum

Core Process	Provide and Administer Retirement Benefits
Key Performance Indicator (KPI)	Benefit Payment Timeliness

KPI Description:

This KPI measures the timeliness of key benefit payment streams, including service and disability retirement, survivor benefits, and refunds. The timeliness of payments is a vital component of a positive customer experience.

Baseline:

Fiscal Year 2017-18, Quarter 1: 95 percent.

Target:

Issue 95 percent of benefit payments within service level timeframes.


KPI Status:

This KPI reflects stable performance well above the threshold.

Refresh Frequency: Quarterly


Reporting Range: FY 2017-18, Quarter 1

Thresholds:

 87% or above

 79% to 87%

 Below 79%

Status: 

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Operational Outcome Measure: Customer Satisfaction Driven Organization

Owner: Donna Lum

Core Process	Provide and Administer Retirement Benefits
Key Performance Indicator (KPI)	Benefit Payment Accuracy

KPI Description:

This KPI measures the accuracy of identified benefit payments. Monitoring this metric ensures our benefit payment calculations are accurate. Accurate payments will aid in the long-term stability of the fund.

Baseline:

Data not available. Data source to capture this metric is anticipated March 2018.

Target:

Issue 98 percent of identified benefit payments within accuracy expectations.

KPI Status:

Data not available. Data source to capture this metric is anticipated March 2018.

Refresh Frequency: Data not available. Data source to capture this metric is anticipated March 2018.

Reporting Range: Data not available. Data source to capture this metric is anticipated March 2018.

Thresholds:

 90% or above

 83% - 89%

 Below 83%

Status: Data not available. Data source to capture this metric is anticipated March 2018.

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Operational Outcome Measure: Customer Satisfaction Driven Organization

Owner: Donna Lum

Core Process	Provide and Administer Retirement Benefits
Key Performance Indicator (KPI)	Customer Satisfaction

KPI Description:

This KPI focuses on measuring customer satisfaction with CalPERS key benefit payment streams including service and disability retirement, survivor benefits, and refunds. Collecting satisfaction data through surveys allows us to pinpoint our customer’s preferences and increases our flexibility and responsiveness to their needs.

Baseline:

Fiscal Year 2017-18, Quarter 1: 86 percent.

Target:

Achieve an overall satisfaction rate of 90 percent, reflecting a positive customer experience across core processes.

KPI Status:


This KPI reflects stable performance above the threshold.

Refresh Frequency: Quarterly


Reporting Range: FY 2017-18, Quarter 1

Thresholds:

 80% or above

 70% to 79%

 Below 70%

Status: 

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Operational Outcome Measure: Open & Transparent Communication

Owner: Donna Lum

Core Process	Educate Members, Employers & Stakeholders
Key Performance Indicator (KPI)	Member Education Satisfaction

KPI Description:

This KPI measures the satisfaction of attendees at webinars, instructor-led training, computer-based training, and CalPERS Benefit Education Events. Measuring satisfaction with our educational services helps us ensure we are listening to our customers and providing them information to help them plan by better understanding their CalPERS benefits.

Baseline:

Fiscal Year 2017-18, Quarter 1: 95 percent.

Target:

Achieve an overall satisfaction rate of 90 percent, reflecting a positive customer experience across multiple educational offerings.


KPI Status:

This KPI reflects stable performance meeting the target.

Refresh Frequency: Quarterly

Reporting Range: FY 2017-18, Quarter 1

Thresholds:

 80% or above

 70% to 79%

 Below 70%

Status: 

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Operational Outcome Measure: Open & Transparent Communication

Owner: Donna Lum

Core Process	Educate Members, Employers & Stakeholders
Key Performance Indicator (KPI)	Employer Education Satisfaction

KPI Description:

This KPI measures the satisfaction of business partners who attend webinars, computer-based, and instructor-led training for employers.

Measuring satisfaction with our educational services helps us ensure we are listening to our customers and providing them information to ensure they understand CalPERS benefit programs and services.

Baseline:

Fiscal Year 2017-18, Quarter 1: 94 percent.

Target:

Achieve an overall satisfaction rate of 90 percent, reflecting a positive customer experience across multiple educational offerings.


KPI Status:


This KPI reflects stable performance well above the threshold.

Refresh Frequency: Quarterly

Reporting Range: FY 2017-18, Quarter 1

Thresholds:

 80% or above

 70% to 79%

 Below 70%

Status: 