



Enterprise Operations Map (EOM) - High Level View (FY 2018-19) - Status as of 12/31/2018 - Quarter 2

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 Measures	RELIABLE STEWARD OF FUNDS Michael Cohen			CUSTOMER SATISFACTION DRIVEN ORGANIZATION Donna Lum		OPEN & TRANSPARENT COMMUNICATION Brad Pacheco			EFFICIENT & EFFECTIVE ORGANIZATION Doug Hoffner			SUPPORTIVE & ENGAGED LEADERSHIP Ben Meng	TEAM MEMBER ENGAGEMENT Liana Bailey-Crimmins
Core Processes	Accounting for Funds <i>Michael Cohen</i>	Managing Investments <i>Ben Meng</i>	Projecting Liabilities <i>Scott Terando</i>	Provide & Administer Retirement Benefits <i>Donna Lum</i>	Provide & Administer Health Care Benefits <i>Liana Bailey-Crimmins</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 <i>ACTO</i> †	Stay within risk boundaries for total fund <i>INVO</i> *	Generate liabilities and rates for pension funding - public agency <i>ACTO</i>	Customer satisfaction <i>CSS</i>	Health plan scorecard of 90% or better <i>HPBB</i> *	% of employer participation in CalPERS annual educational forum <i>CSR</i>	Member rating on stakeholder perception survey <i>CSR</i> *	Member, employer & stakeholder rating on perception survey <i>CSR</i> *	Project portfolio health <i>OPT</i>	Timely resolution of public agency reviews <i>CSS</i>	Small business & disabled veterans business enterprise requirements compliance <i>OPT</i> *	Team member perception of leadership-manager relationships <i>OPT</i>	Average time to hire for hard-to-recruit positions <i>OPT</i> *
	Produce CAFR with no material weaknesses <i>FINO</i> †	Aggregate risk levels of the INVO operating model (TOM) <i>INVO</i> *	Generate liabilities for long-term care program <i>ACTO</i> *	Benefit payment accuracy <i>CSS</i>	Customer inquiry timeliness <i>HPBB</i> *	Member education satisfaction <i>CSS</i>	Employer rating on stakeholder perception survey <i>CSR</i> *			Form 700 completed timely <i>ECOM</i> *	Solicitation, contract, amendment, & purchase order service level compliance <i>OPT</i> *	Team member perception of leadership-senior & executive management relationships <i>OPT</i>	Retention rate <i>OPT</i> †
	% forecast to actual expenses (annually) <i>FINO</i>	Strategic asset allocation ranges (if outside approved ranges) <i>INVO</i> *	Generate liabilities and rates for pension funding - state <i>ACTO</i>	Benefit payment timeliness <i>CSS</i>	Population health dashboard <i>HPBB</i> †	Employer education satisfaction <i>CSS</i>	Stakeholder rating on stakeholder perception survey <i>CSR</i> *			Mandated training compliance <i>ECOM</i> *		Retain highly skilled senior leaders <i>OPT</i> †	Rewards & recognition perceptions <i>OPT</i>
	Maintain appropriate reserve levels - CERBT fund <i>FINO</i>	Adequate liquidity coverage <i>FINO</i>	Generate liabilities and rates for pension funding - schools <i>ACTO</i>		Rating of health care <i>HPBB</i> *		Community outreach efforts <i>CSR</i> *			Personal trading monitoring <i>ECOM</i> *		Health of enterprise performance reporting framework <i>OPT</i> **	Work life balance perceptions <i>OPT</i>
	Maintain appropriate reserve levels - long-term care fund <i>FINO</i>	Cash forecasting accuracy <i>FINO</i>			Public agency retention <i>HPBB</i> *					Ensure evacuation readiness <i>OPT</i> *		Operational sustainability report <i>OPT</i> †	Team member perception of training and development <i>OPT</i>
	Maintain appropriate reserve levels - defined benefit funds <i>FINO</i>				Public agency recruitment <i>HPBB</i> *					Business continuity readiness <i>OPT</i> †		Cyber security risk rating <i>OPT</i> (closed session)	Response rate of employee engagement survey <i>OPT</i>
Legend	Operating	Supporting	† Denotes Informational KPIs	* Pending Refresh	** Data not available	KPI under development	On-Target	At-Risk	Off-Target				
									Lean adoption <i>OPT</i>	Employers current on CalPERS health obligations <i>FINO</i>	Employers current on CalPERS pension obligations <i>FINO</i>		Emerging leader program <i>OPT</i> †
													100% of all ideas responded to within 120 days <i>OPT</i>
													80% of all viable ideas implemented as scheduled <i>OPT</i>
													Our Promise and annual food drive <i>CSR</i> †