



Enterprise Operations Map (EOM) - High Level View (FY 2018-19) - Status as of 3/31/2019 - Quarter 3

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> ↑			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>	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> ↑