



Enterprise Operations Map (EOM) - High Level View (FY 2018-19) - Status as of 6/30/2019 - Quarter 4

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