

Enterprise Operations Map (EOM) - High Level View (FY 2019-20) - Status as of 9/30/2019 - Quarter 1

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 the ir 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 Donald Moulds	
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>Donald Moulds</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)	<p>GASB 68 reports completed timely <i>ACTO</i> †</p> <p>Produce CAFR with no material weaknesses <i>FINO</i> †</p> <p>% forecast to actual expenses (annually) <i>FINO</i> *</p> <p>Maintain appropriate reserve levels - CERBT fund <i>FINO</i></p> <p>Maintain appropriate reserve levels - long-term care fund <i>FINO</i></p> <p>Maintain appropriate reserve levels - defined benefit funds <i>FINO</i></p>	<p>Stay within risk boundaries for total fund <i>INVO</i></p> <p>Aggregate risk levels of the INVO operating model (TOM) <i>INVO</i></p> <p>Strategic asset allocation ranges (if outside approved ranges) <i>INVO</i></p> <p>Adequate liquidity coverage <i>FINO</i></p> <p>Cash forecasting accuracy <i>FINO</i></p>	<p>Generate liability data and rates for pension funding - public agency <i>ACTO</i></p> <p>Generate liability data for long-term care program <i>ACTO</i> *</p> <p>Generate liability data and rates for pension funding - state <i>ACTO</i></p> <p>Generate liability data and rates for pension funding - schools <i>ACTO</i></p>	<p>Customer satisfaction <i>CSS</i></p> <p>Benefit payment accuracy <i>CSS</i></p> <p>Benefit payment timeliness <i>CSS</i></p>	<p>Health plan scorecard of 90% or better <i>HPBB</i> *</p> <p>Customer inquiry timeliness <i>HPBB</i></p> <p>Population health dashboard <i>HPBB</i> †</p> <p>Rating of health care <i>HPBB</i> *</p> <p>Public agency retention <i>HPBB</i> *</p> <p>Public agency recruitment <i>HPBB</i> *</p>	<p>% of employer participation in CalPERS annual educational forum <i>CSR</i> *</p> <p>Member education satisfaction <i>CSS</i></p> <p>Employer education satisfaction <i>CSS</i></p>	<p>Member rating on stakeholder perception survey <i>CSR</i> *</p> <p>Employer rating on stakeholder perception survey <i>CSR</i> *</p> <p>Stakeholder rating on stakeholder perception survey <i>CSR</i> *</p> <p>Community outreach efforts <i>CSR</i> *</p>	<p>Member, employer & stakeholder rating on perception survey <i>CSR</i> *</p>	<p>Project portfolio health <i>OPT</i></p>	<p>Timely resolution of public agency reviews <i>CSS</i></p> <p>Form 700 completed timely <i>ECOM</i> *</p> <p>Mandated training compliance <i>ECOM</i> *</p> <p>Personal trading monitoring <i>ECOM</i> *</p> <p>Ensure evacuation readiness <i>OPT</i></p> <p>Business continuity readiness <i>OPT</i> †</p> <p>Cyber security risk rating (Closed Session) <i>OPT</i></p> <p>Lean adoption <i>OPT</i></p> <p>Employers current on CalPERS health obligations <i>FINO</i></p> <p>Employers current on CalPERS pension obligations <i>FINO</i></p>	<p>Small business requirements compliance <i>OPT</i></p> <p>Disabled veterans business enterprise requirements compliance <i>OPT</i></p> <p>Solicitation, contract, amendment, & purchase order service level compliance <i>OPT</i></p>	<p>Team member perception of leadership-team leader relationships <i>OPT</i></p> <p>Retain highly skilled senior leaders <i>OPT</i> †</p> <p>Health of enterprise performance reporting framework <i>OPT</i> *</p> <p>Operational sustainability report <i>OPT</i> †</p>	<p>Average time to hire for hard-to-recruit positions <i>OPT</i></p> <p>Retention rate <i>OPT</i> †</p> <p>Rewards & recognition perceptions <i>OPT</i> *</p> <p>Work life balance perceptions <i>OPT</i> *</p> <p>Team member perception of training and development <i>OPT</i> *</p> <p>Response rate of employee engagement survey <i>OPT</i> *</p> <p>Emerging leader program <i>OPT</i> †</p> <p>100% of all ideas responded to within 120 days <i>OPT</i></p> <p>80% of all viable ideas implemented as scheduled <i>OPT</i></p> <p>Our Promise and annual food drive <i>CSR</i> †</p>	
Legend	<p>† Denotes Informational KPIs * Pending Refresh ■ On-Target ■ At-Risk ■ Off-Target</p>													