

Enterprise Operations Map (EOM) - High Level View (FY 2019-20)

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

† Denotes Informational KPIs
* Pending Refresh