







Enterprise Operations Map (EOM) - High Level View (FY 2021-22)



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	<div></div> <div>RELIABLE STEWARD OF FUNDS</div>			<div></div> <div>CUSTOMER SATISFACTION DRIVEN ORGANIZATION</div>		<div></div> <div>OPEN & TRANSPARENT COMMUNICATION</div>			<div></div> <div>EFFICIENT & EFFECTIVE ORGANIZATION</div>			<div></div> <div>SUPPORTIVE & ENGAGED LEADERSHIP</div>	<div></div> <div>TEAM MEMBER ENGAGEMENT</div>
Core Processes	Accounting for Funds	Managing Investments	Projecting Liabilities	Provide & Administer Retirement Benefits	Provide & Administer Health Care Benefits	Educate Members, Employers & Stakeholders	Listening & Informing	Brand Reputation	Leveraging Technology	Compliance & Managing Risks	Purchasing & Acquisition	Managing Resources & Performance	Attracting & Supporting Team Members
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	Percent of employer participation in CalPERS annual educational forum	Member rating on stakeholder perception survey	Member, employer & stakeholder rating on perception survey	Project portfolio health	Form 700 completed timely	Small business requirements compliance	Team member perception of leadership - manager relationships	Average time to hire for hard to recruit positions
	Produce ACFR 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		ITSB service performance	Mandated training compliance	Disabled veterans business enterprise requirements compliance	Health of enterprise performance reporting framework	Retention Rate
	Percent 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	Public agency retention	Employer education satisfaction	Stakeholder rating on stakeholder perception survey			Personal trading monitoring	Solicitation, contract, amendment, & purchase order service level compliance		Recognition perceptions
	Maintain appropriate reserve levels - CERBT fund	Adequate liquidity coverage	Generate liability data and rates for pension funding - schools		Public agency recruitment		Community outreach efforts			Ensure evacuation readiness			Employee empowerment perceptions
	Maintain appropriate reserve levels - long-term care fund	Cash forecasting accuracy			Self-reported overall health status					Business continuity readiness			Team member perception of growth and development
	Maintain appropriate reserve levels - defined benefit funds				Opioids - dose					Lean adoption			Response rate of employee engagement survey
Legend	<div>† Denotes Informational KPIs</div> <div>* Pending Refresh</div> <div>** Data Not Available</div> <div>On-Target</div> <div>At-Risk</div> <div>Off-Target</div>								Unauthorized member self-service account changes (closed session)	Time to detect cyber security threats (closed session)	Reportable privacy violations (closed session)		Emerging leader program
					C-section rate					Employers current on CalPERS health obligations			100% of all ideas responded to within 120 days
										Employers current on CalPERS pension obligations			80% of all viable ideas implemented as scheduled
										Member self-service fraud resulting in financial loss (closed session)			Our Promise and annual food drive