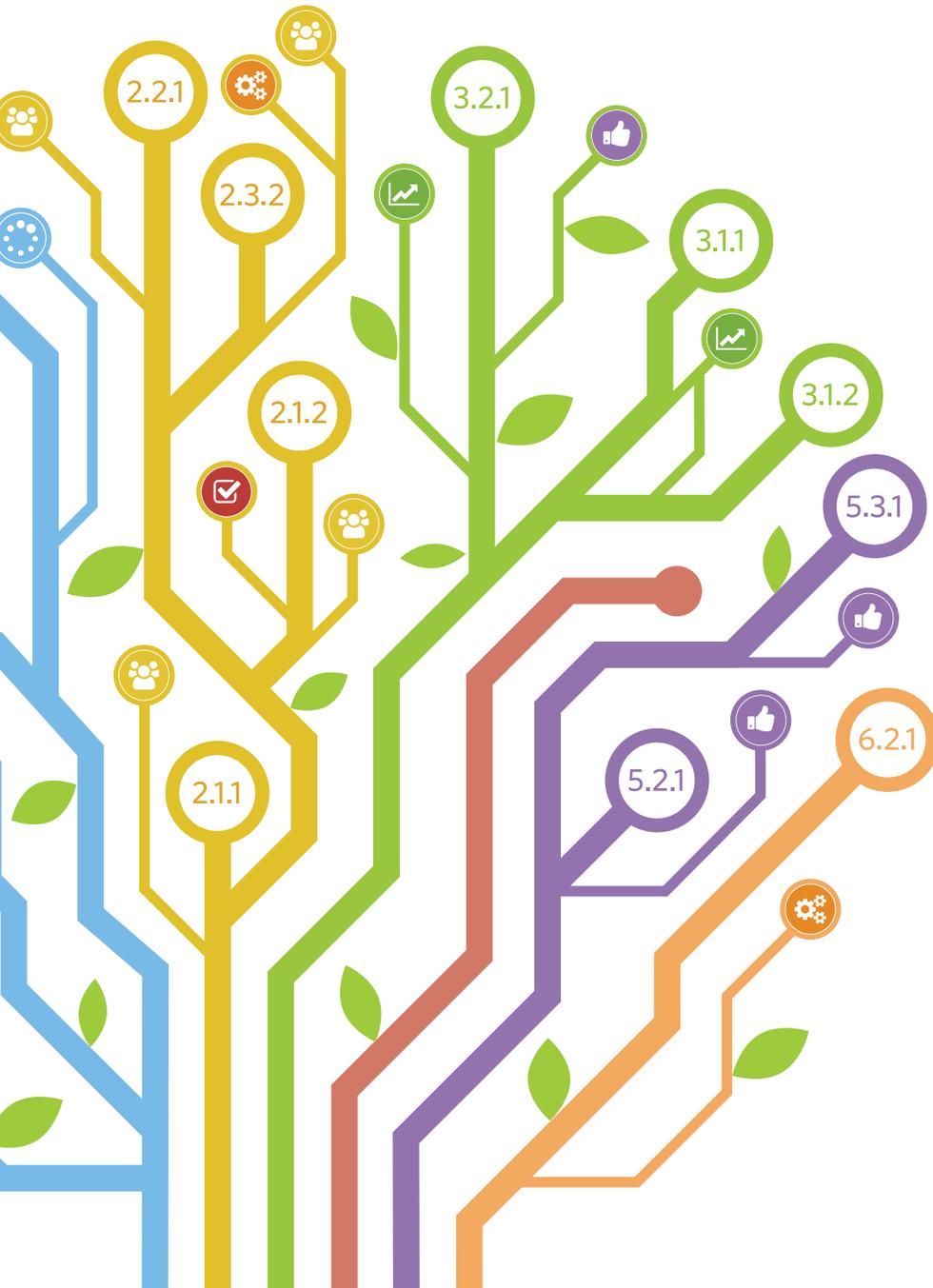


Information Technology Services Branch

2014-2017 Strategic Plan

The Journey Continues

Fiscal Year 2015-16



Thanks to CalPERS ITSB staff who volunteered to participate in our photo sessions for this publication.

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Our initiatives allow us to bring our goals to life and realize our vision.





Liana Bailey-Crimmins

Message from the Chief Information Officer

As the successful first year of our 3-year strategic plan journey comes to a close, I am excited to present the updated California Public Employees' Retirement System (CalPERS) **Information Technology Services Branch (ITSB) Strategic Plan: The Journey Continues — FY 2015-16.**

Our first year's initiatives were a call to action to our ITSB staff with a focus on engagement and collaboration. We ambitiously launched 23 initiatives that were led by ITSB managers with teams made up from staff at all levels, whose faces are reflected throughout this document, and whose ideas are resonant in our achievements. Our staff's excitement and dedication drives our success. Through collaboration, teamwork, and progressive business partnerships, we have set the foundation for a successful journey, and have delivered initiatives that have already made a positive impact and resulted in a stronger, more customer-focused IT organization.

This revised edition highlights our key accomplishments for Fiscal Year 2014-15. The initiatives we completed have not only moved the dial towards achieving our goals over the 3-year period, but they have operationalized several new processes and helped to further define our Culture of Excellence. Our newly adopted culture statement is a product of collaboration between ITSB staff which was selected by staff vote.

When establishing our Year 2 initiatives, we looked for opportunities to achieve multiple objectives with a single initiative. Looking across all of our goals and objectives, we've selected 16 new initiatives in partnership with our business stakeholders. As these initial achievements take root, blossom into daily practices, and are indoctrinated into our culture, we embark on a new phase of our journey that will ultimately bring us closer to reaching the next level as a premier State IT organization.

Reflection on Fiscal Year 2014-15

The ITSB Strategic Plan documents strategic goals, objectives, and initiatives for reaching the next level as a premiere State Information Technology Organization. When fully implemented in 2017, the plan provides a technology infrastructure that is more agile, reliable, cost-effective, and dynamic.

The Fiscal Year 2014-15 plan included 23 initiatives, 86 percent of which are complete. Reflecting on the accomplishments of the first year of the plan allows us to measure how close we are to meeting the goals of this 3-year strategic plan.

Key Accomplishments

Goal 1: Innovate for Success

Apply innovation to drive increased business value for CalPERS

- Launched the first Innovative Idea Challenge as part of the Innovation Award Program on July 1, 2015.
- Established a “100 day” innovation delivery process to allow for delivery of innovative, “quick win” solutions.
- Established a “thinkers’ forum” comprised of business and IT staff to discuss innovative ideas with a business focus. The first forum was focused on addressing business needs through innovative solutions for Human Resources.
- Presented the first Information Technology Showcase on June 11, 2015 with attendance from across the enterprise. The event featured nationally recognized speakers on the topics of Innovation, Future of Technology, Cybersecurity and more.

Goal 2: Culture of Excellence

Foster a culture that attracts, retains, inspires, and invests in people and their contributions to excellence

- Developed the ITSB Culture Statement to complement the CalPERS Core Values and to define excellence as a foundation for our positive workforce culture in ITSB.
- Enhanced ITSB’s recruitment activities through active participation in hiring events and career fairs, development of a mobile examination app, and meeting with local tech companies to understand how their culture supports recruitment and retention of excellent employees.
- Launched the ITSB pilot of the **illuminet** website, a skills repository and internal professional network for mentor/mentee matching. **illuminet** also embraces the collaborative and innovative spirit with a Power Finder feature that allows for quick identification of people with specific required skills.

Goal 3: Deliver Value

Align resources with prioritized organizational needs to ensure maximum value from IT investments

- Developed a Business Value Dashboard (BVD) that articulates ITSB's contribution and health of services it delivers to the business. The BVD provides performance metrics and trends in Project Delivery, Service Availability, Security, IT Project Spend, ITSB Operating Costs, and Workforce Investment.

Goal 4: Deliver Quality Services

Consistently deliver quality services by utilizing efficient and effective repeatable processes

- Rolled out the first feature in our new Information Technology Service Manager tool, ServiceNow. The first process optimized through ServiceNow is the Card Access Request Form (CARF), automating the process for requesting security badges.
- Modified the Change Control policy including implementation of a Risk/Impact calculator to assist in proper categorization of changes. To communicate the new process, added Change Management as a topic for new employee orientation and created a Change Management portal on Inside CalPERS – a one stop shop for all things change.

Goal 5: Instill Confidence and Trust

Our Customers and Staff know we are invested in their success because we are transparent, accountable, and honest

- Formalized an intake feedback process to coordinate requests for IT resources in alignment with enterprise goals and objectives. Used the IT Project Planning Proposal Process (IT PPP) as a vehicle for prioritization and approval of submissions through the Senior Leadership Council.

- Created a methodology and process for planning and coordinating live and virtual staff forums that promote a supportive environment for multi-level intra-branch communications, sharing of information, and learning from one another.
- Conducted the ITSB Customer Satisfaction Survey to learn how our customers measure IT's performance and our rate of continuous improvement in our effort to achieve unparalleled service quality.
- Completed a 3-month pilot in the Business Applications Infrastructure Services Division to demonstrate how time reporting provides transparency into work activities and resource usage.

Goal 6: Be a Strategic Partner

Partner with our customers to plan and achieve business goals

- Created a "Day in the Life" program to allow IT staff to build business acumen through job shadowing and partnership with our business partners, enhancing our ability to be a strategic advisor to our customers.
- Created a "New ITSB Employee Orientation" program to build cooperation and understanding of roles and responsibilities for new IT staff.
- Developed an overarching vision statement for Business Relationship Management engagement across CalPERS: "We are committed at all levels to build and maintain positive relationships, understand customers' needs, and ensure appropriate services are delivered."

As our Strategic Plan journey continues in Fiscal Year 2015-16, we will continue to build on the momentum of these accomplishments, moving closer to achieving our goals.

Philosophies

CalPERS Core Values

ITSB will execute its mission and pursue its vision guided by the core values of the enterprise.

Quality

- Consider, understand, and manage risk
- Proactively explore policy and product opportunities to better serve our customers
- Seek to “do it right” the first time
- Strive to exceed customers’ needs and expectations through competence, innovation, and teamwork

Respect

- Are courteous, responsive, and professional
- Stay present in the moment and actively listens to understand others
- Treat every person with kindness and humility
- Value and recognize every individual for their unique skills, talents, and contributions

Accountability

- Find solutions that contribute to desired results
- Give and seeks clear expectations
- Make sound decisions from experience, good judgment, and collaboration
- Take ownership of, and responsibility for, actions, risks, and results, and use outcomes as learning opportunities

Integrity

- Act in all endeavors with an ethical, honest mindset and in a professional manner
- Are truthful in all actions and communications
- Honor commitments, keep promises, and build trust

Openness

- Approaches every situation with good intentions
- Are receptive to new and diverse ideas
- Encourage a trusting environment by being genuine and transparent in actions and communications
- Listen, cooperate, and share across the organization

Balance

- Embrace opportunities for personal and professional development
- Maintain focus on long-term goals while meeting short-term needs
- Support a healthy personal and professional balance
- Support an environment that is optimistic and enjoyable in which relationships can prosper across our organization and communities

ITSB Mission

The Information Technology Services Branch (ITSB) provides innovative solutions that enable CalPERS to serve those who serve California. ITSB partners with CalPERS business stakeholders to design and implement technology solutions that add business value and deliver customer focused results to support the CalPERS mission. To provide responsible and efficient stewardship of the System, ITSB develops, manages, and maintains the technology infrastructure to deliver promised retirement and health benefits.

ITSB Vision

ITSB's vision is to become the premier State IT organization known for excellence, where everything we do adds business value and delivers customer focused results, through our people and processes.

ITSB Culture Statement

Creating Innovative Solutions to Meet Business & Customer Needs.
Achieving Excellence.

ITSB Strategic Goals



Goal 1 Innovate for Success

Apply innovation to drive increased business value for CalPERS.



Goal 4 Deliver Quality Services

Consistently deliver quality services by utilizing efficient and effective repeatable processes.



Goal 2 Culture of Excellence

Foster a culture that attracts, retains, inspires, recognizes, and invests in people and their contributions to excellence.



Goal 5 Instill Confidence & Trust

Our customers and staff know we are invested in their success because we are transparent, accountable, and honest.



Goal 3 Deliver Value

Align resources with prioritized organizational needs to ensure maximum value from IT investments.



Goal 6 Be a Strategic Partner

Partner with our customers to plan and achieve business goals.



How will we
grow
 our future?

Our initiatives allow us to bring our goals to life and realize our vision.



Goal 1: Innovate for Success

Apply innovation to drive increased business value for CalPERS.

Objective 1.1 - Encourage and leverage innovative thinking toward successful outcomes.

- **Initiative 1.1.1 - Establish an agile pathway to get concepts to reality.**

 Maps to 2.3.1

Objective 1.2 - Innovative and flexible in our methods of delivering solutions.

- **Initiative 1.2.1 - Operationalize the 100 Day Program and thinkers forums leveraging our governance process.**

 Maps to 1.3.1

Objective 1.3 - Institutionalize innovative framework through People, Process, and Technology.

 Maps to 1.2.1

Objective 1.4 - Be an innovative advisor to business.

- **Initiative 1.4.1 - Exchange ideas, share knowledge, and build relationships to create opportunities for Business and IT.**

   Maps to 4.1.1, 5.1.1, 6.1.1

Objective 1.5 - Encourage innovative thinking and provide a forum to challenge the status quo.

- **Initiative 1.5.1 - Develop a space for innovation and problem solving.**



Goal 2: Culture of Excellence

Foster a culture that attracts, retains, inspires, recognizes, and invests in people and their contributions to excellence.

Objective 2.1 – Embrace and institute a culture that advances our people.

- Initiative 2.1.1 – Develop a communication and culture reinforcement program to ensure staff and candidates understand the ITSB Culture.
- Initiative 2.1.2 – Develop a pilot program to ensure ITSB managers and supervisors develop and maintain skills to enhance employee/management relationships.

 Maps to 4.2.1

Objective 2.2 – Hire and retain staff that embrace the culture of excellence.

- Initiative 2.2.1 – Explore which functions within ITSB can support teleworking and implement a pilot to test its viability.

Objective 2.3 – Provide rewarding and challenging opportunities that inspire us to reach our highest potential.

 Maps to 1.1.1

- Initiative 2.3.2 – Deploy **illuminet** to additional divisions within the enterprise.

 Maps to 6.1.3



Goal 3: Deliver Value

Align resources with prioritized organizational needs to ensure maximum value from IT investments.

Objective 3.1 – Establish an integrated IT governance structure that leverages data to make collaborative decisions.

- Initiative 3.1.1 – Enhance our governance structure to accommodate 100 Day Program, thinkers forum, and innovation opportunities.
- Initiative 3.1.2 – Mature the ITSB Service Portfolio to include service costs, options, and service levels.

Objective 3.2 – Use reportable measurements to drive ongoing improvements in service delivery to achieve business results.

- Initiative 3.2.1 – Implement Technology Business Management (TBM) to communicate and manage resource investment.



Maps to 5.4.1



Goal 4: Deliver Quality Services

Consistently deliver quality services by utilizing efficient and effective repeatable processes.

Objective 4.1 - Understand our customers' needs and offer services that conform to the customers' expectations.



Maps to 1.4.1, 5.1.1, 6.1.1

Objective 4.2 - Engineer and deliver services through consistent value added processes, skilled workforce, and appropriate technologies.



Maps to 2.1.2



Goal 5: Instill Confidence & Trust

Our customers and staff know we are invested in their success because we are transparent, accountable, and honest.

Objective 5.1 – Be invested in customer needs, reflect their sense of urgency, and keep commitments.



Maps to 1.4.1, 4.1.1, 6.1.1

Objective 5.2 Enhance the work environment of ITSB with bi-directional communication and feedback to encourage cross-functional collaboration.

- **Initiative 5.2.1 – Invest in and empower the Problem Management Team to address and develop cross-functional solutions to ITSB’s operational identified problems.**

Objective 5.3 – Communicate with customers to learn their level of satisfaction with ITSB services, then review and follow up to use their feedback for continuous improvement.

- **Initiative 5.3.1 – Analyze and address the gaps identified in the customer satisfaction feedback survey.**

Objective 5.4 – Provide meaningful quality information to achieve fiscal and strategic transparency.



Maps to 3.2.1



Goal 6: Be a Strategic Partner

Partner with our customers to plan and achieve business goals.

Objective 6.1 – Acquire and share business knowledge to be a better strategic partner.



Maps to 1.4.1, 4.1.1, 5.1.1

- Initiative 6.1.2 – Establish an informative ITSB onboarding program to provide information about training opportunities, division functions, and services provided.



6.1.3 Maps to 2.3.2

Objective 6.2 – Achieve unified leadership through bi-directional customer collaboration.

- Initiative 6.2.1 – Establish Enterprise Architecture as a business-focused program to enhance communication, increase ITSB speed of delivery, improve system reliability, lower cost, and reduce complexity.



Maps to 6.3.1

Objective 6.3 – Optimize our ability to deliver shared success.



Maps to 6.2.1

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ITSB Senior Leaders

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Goal Owners & Initiative Teams

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