

ITSB Strategic Plan

Information Technology Services Branch

2014-17

Message from the CIO



I am pleased to present the California Public Employees' Retirement System (CalPERS) Information Technology Services Branch (ITSB) 2014-17 Strategic Plan. In partnership with CalPERS program areas, ITSB launched a comprehensive review of its technology goals and objectives in order to ensure unparalleled quality services in alignment with CalPERS Vision.

At CalPERS, there is a collective desire for excellence; it is an innate part of our culture reflecting CalPERS core values. The ITSB Strategic Plan demonstrates these values through our goals and objectives. Whether it is excellence in innovation, partnership, services, or quality, our ITSB Strategic Plan reflects our commitment to customer-focused results and delivering business value.

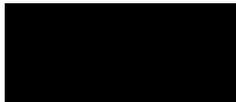
The plan is not meant to be a detailed roadmap or a step-by-step blueprint. Rather, the ITSB Strategic Plan documents ITSB's strategic goals, objectives, and initiatives for reaching the next level as a premier State IT organization. It is a call to action. In FY 14-15, ITSB will launch an implementation plan to bring our goals to life and realize our vision.

The ITSB Strategic Plan, when fully implemented, brings the technology infrastructure to a new level that is more agile, reliable, cost-effective, and dynamic, enabling CalPERS to respond more quickly to the changing landscape of technology and business challenges posed by external influences. The ITSB Strategic Plan contributes to CalPERS ability to capitalize on its reputation for excellence.

Ensure unparalleled quality services
in alignment with CalPERS Vision

I look forward to working with you to achieve our vision!

Sincerely,



LIANA BAILEY-CRIMMINS
Chief Information Officer
Information Technology Services Branch

Delivering Value through Partnership



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Introduction



Introduction

The 2014-17 Information Technology Services Branch (ITSB) Strategic Plan serves as a timely update to the Strategic Information Systems Plan (SISP) released in 2010. It is designed with the future in mind, taking into consideration the rapid changes of technology and business needs. As technology is integral to how CalPERS conducts its business, this plan is a companion document to the CalPERS Strategic Plan 2012-17.

Background

In 2005, ITSB's Strategic Plan introduced the concept of an integrated technical architecture driven by web-based communications in order to build self-services for our customers. The vision of mylCalPERS was born.

In 2010, ITSB's Strategic Plan leveraged the 2005 vision by focusing on the technology processes to implement and support web-based operations. The launch of mylCalPERS was in the foreseeable future.

In 2014, ITSB's Strategic Plan focuses on adding business value in alignment with CalPERS Vision and Strategic Plan. Through the realization of self-services and wrap-around customer care, ITSB is helping CalPERS deliver unparalleled quality services today and tomorrow.

The 2014-17 ITSB Strategic Plan is a living document representing the voice of ITSB. CalPERS is our business; information technology is our contribution.

Approach

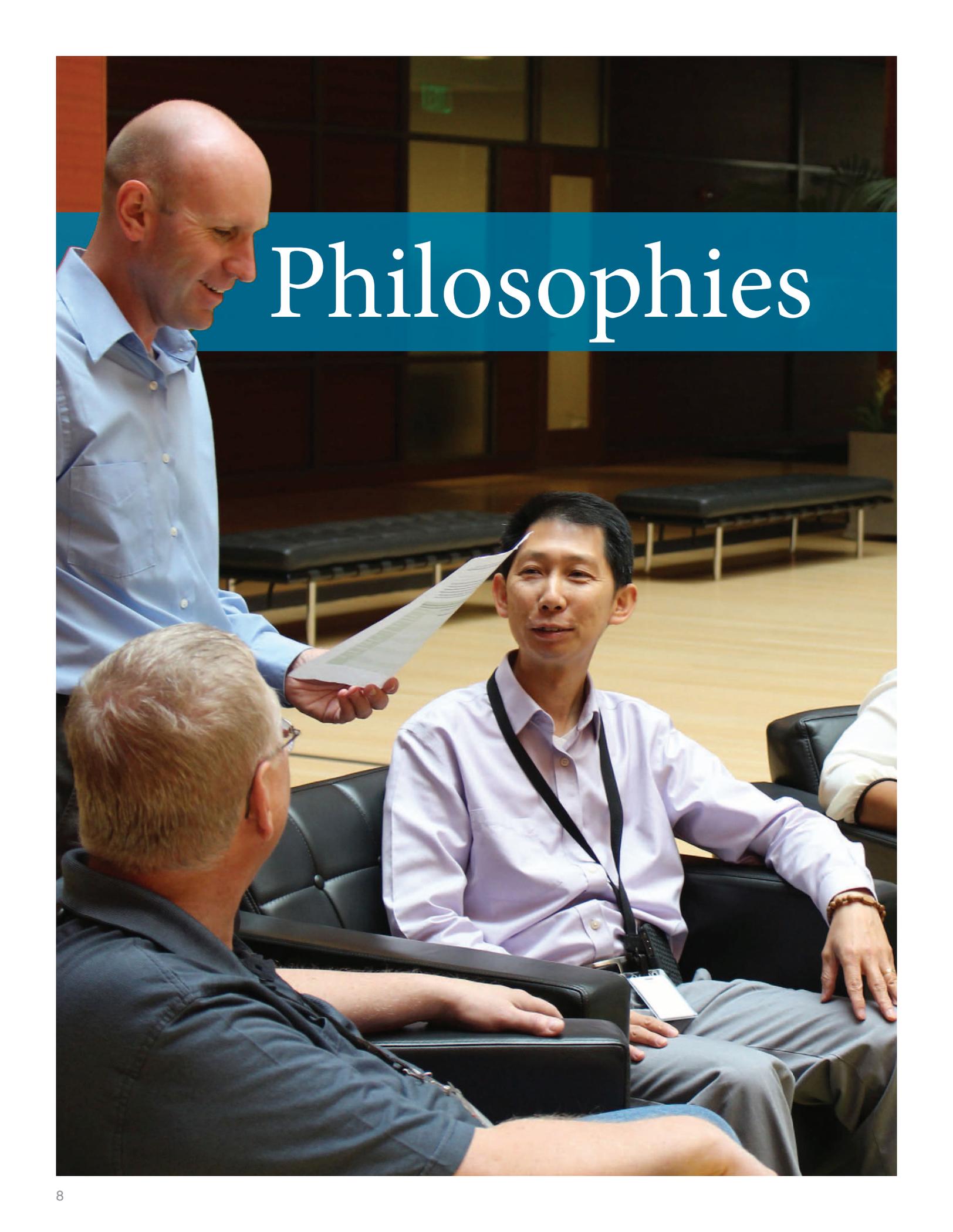
More than 57 staff participated in the development of the 2014-17 ITSB Strategic Plan. Volunteer groups built meaningful objectives and initiatives to support ITSB's goals. A communications taskforce created multiple outreach

channels to engage and educate staff across the organization. These volunteers are individually recognized in the closing section of the plan.

A collaborative approach was used in crafting the plan by engaging CalPERS program areas in the development and review process. Strategic planning sessions were held featuring executives from various CalPERS program areas such as Investments, Risk Management, Public Affairs, Fiscal, Operations, and Customer Services and Support. Their diverse perspectives provided valuable insights into how we can further improve services for our clients.

The initiatives were designed to reflect twelve month desired outcomes. The three year strategic plan will be reviewed annually to refresh initiatives.

CalPERS is our Business;
Information Technology
is our Contribution



Philosophies

Philosophies

CalPERS Core Values

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

Quality

- Strives to exceed customers' needs and expectations through competence, innovation, and teamwork
- Proactively explores policy and product opportunities to better serve our customers
- Seeks to "do it right" the first time
- Considers, understands and manages risk

Respect

- Treats every person with kindness and humility
- Values and recognizes every individual for their unique skills, talents, and contributions
- Stays present in the moment and actively listens to understand others
- Is courteous, responsive and professional

Accountability

- Takes ownership of, and responsibility for, actions, risks, and results and uses outcomes as learning opportunities
- Makes sound decisions from experience, good judgment, and collaboration
- Gives and seeks clear expectations
- Finds solutions that contribute to desired results

Integrity

- Acts in all endeavors with an ethical, honest mindset and in a professional manner
- Honors commitments, keeps promises, and builds trust
- Is truthful in all actions and communications

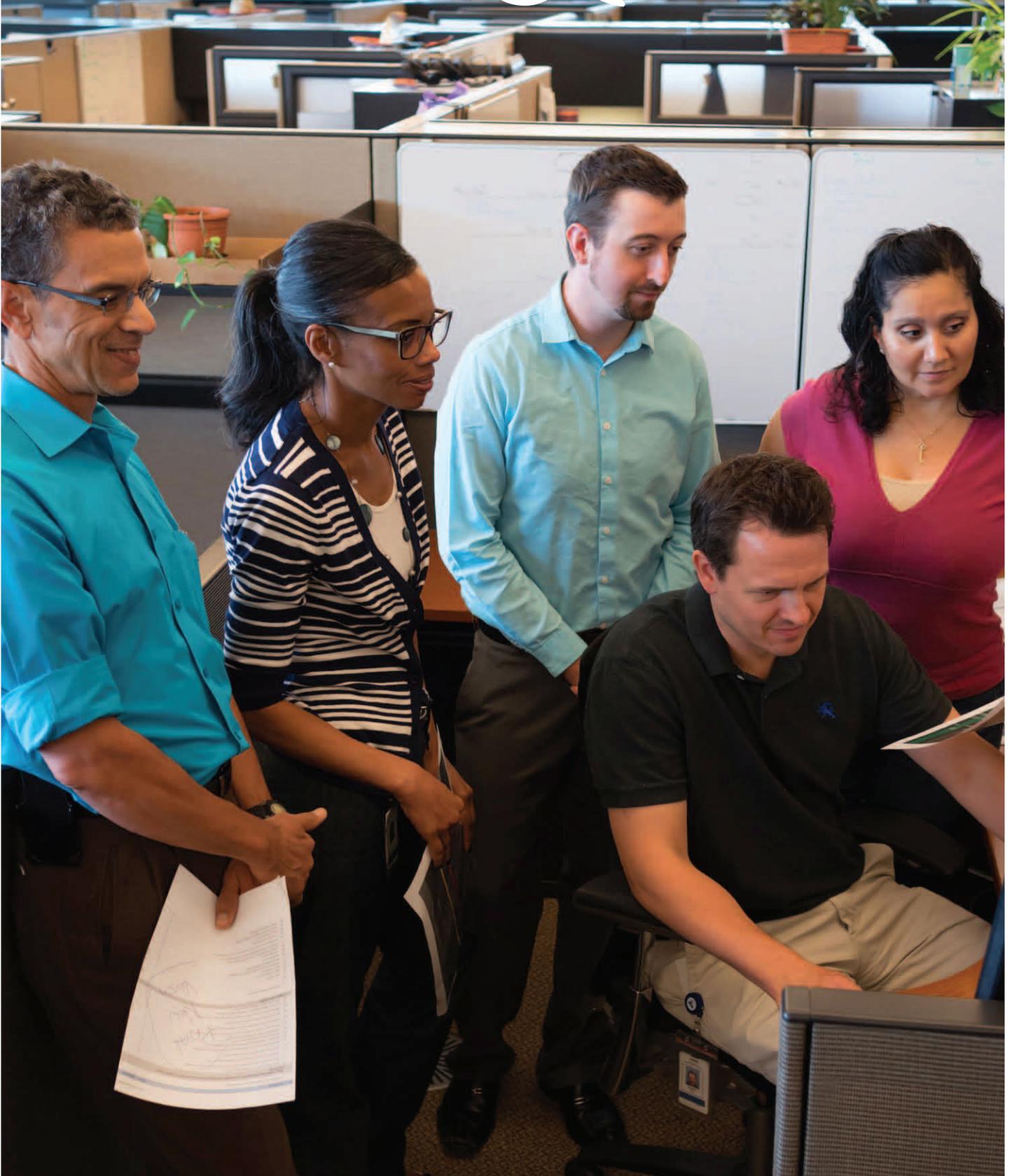
Openness

- Approaches every situation with good intentions
- Is receptive to new and diverse ideas
- Listens, cooperates, and shares across the organization
- Encourages a trusting environment by being genuine and transparent in actions and communications

Balance

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

Mission & Vision



Mission

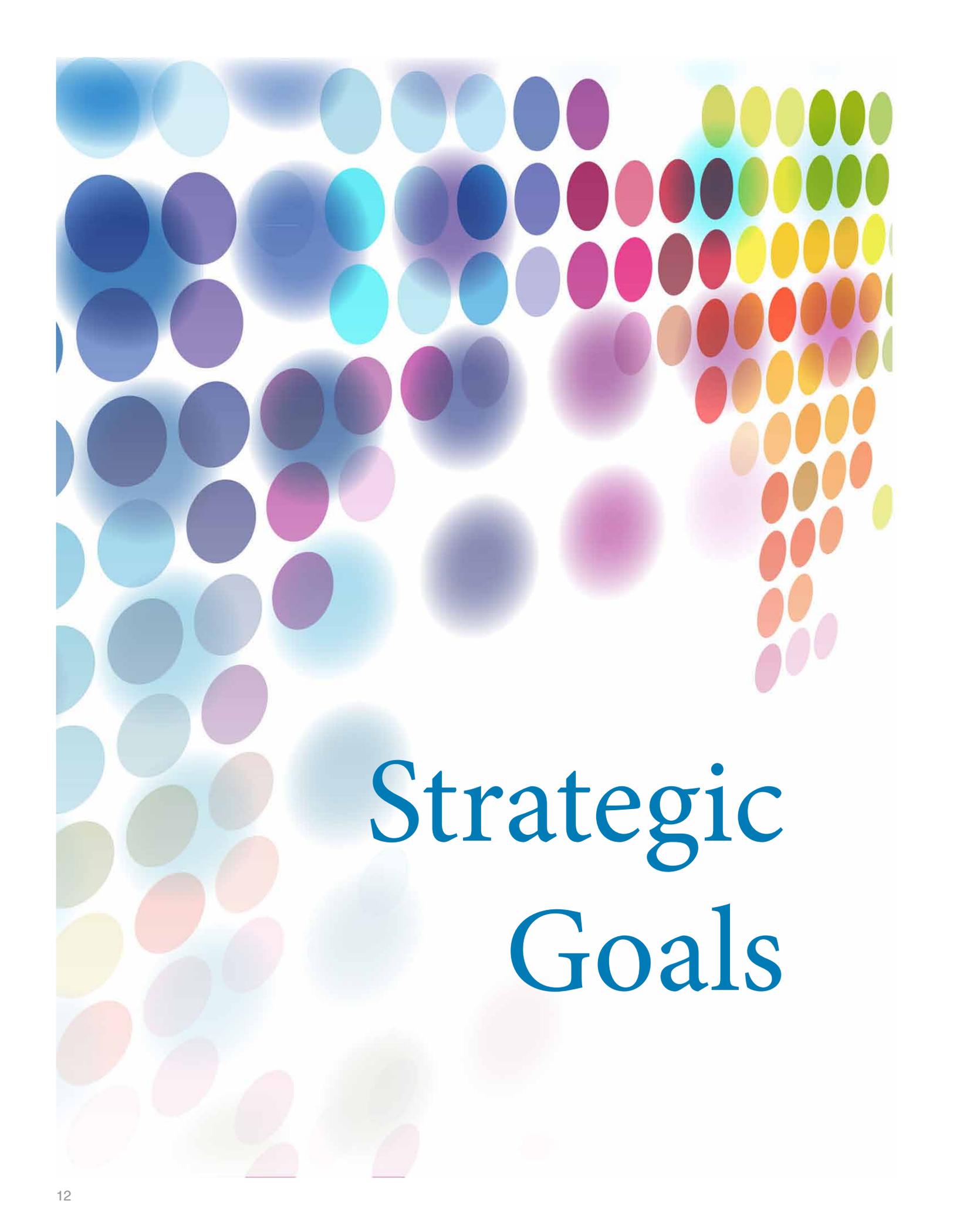
The Information Technology Services Branch (ITSB) provides innovative solutions that enable CalPERS to serve those who serve California. ITSB partners with CalPERS business stakeholders to design and implement technology solutions that add business value and deliver customer focused results to support 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.

Vision

ITSB is 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.

Design and implement technology solutions that add business value





Strategic Goals

1

Innovate for Success

Apply innovation to drive increased business value for CalPERS.

4

Deliver Quality Services

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

2

Culture of Excellence

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

5

Instill Confidence & Trust

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

3

Deliver Value

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

6

Be a Strategic Partner

Partner with our customers to plan and achieve business goals.

GOAL 1

Innovate for Success



Innovate for Success

Apply innovation to drive increased business value for CalPERS.



GOAL 1

Strategic Objectives & Initiatives

1.1 – Encourage and leverage innovative thinking toward successful outcomes.

- 1.1.1 – Establish a technology innovation award program.

1.2 – Innovative and flexible in our methods of delivering solutions.

- 1.2.1 – Establish an annual “100 Day” innovation delivery system.

1.3 – Institutionalize innovative framework through People, Process, and Technology.

- 1.3.1 – Establish a formal ITSB innovation communication exchange method to drive ideation.

1.4 – Be an innovative advisor to business.

- 1.4.1 – Establish a forum with a business focus to share innovative ideas.

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

- 1.5.1 – Create a technology road show that introduces innovative ideas to solve key business problems.



GOAL 2
Culture of Excellence



Culture of Excellence

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

GOAL 2

Strategic Objectives & Initiatives

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

- 2.1.1 – Define ITSB’s Culture of Excellence by laying a foundation for a positive workforce culture.

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

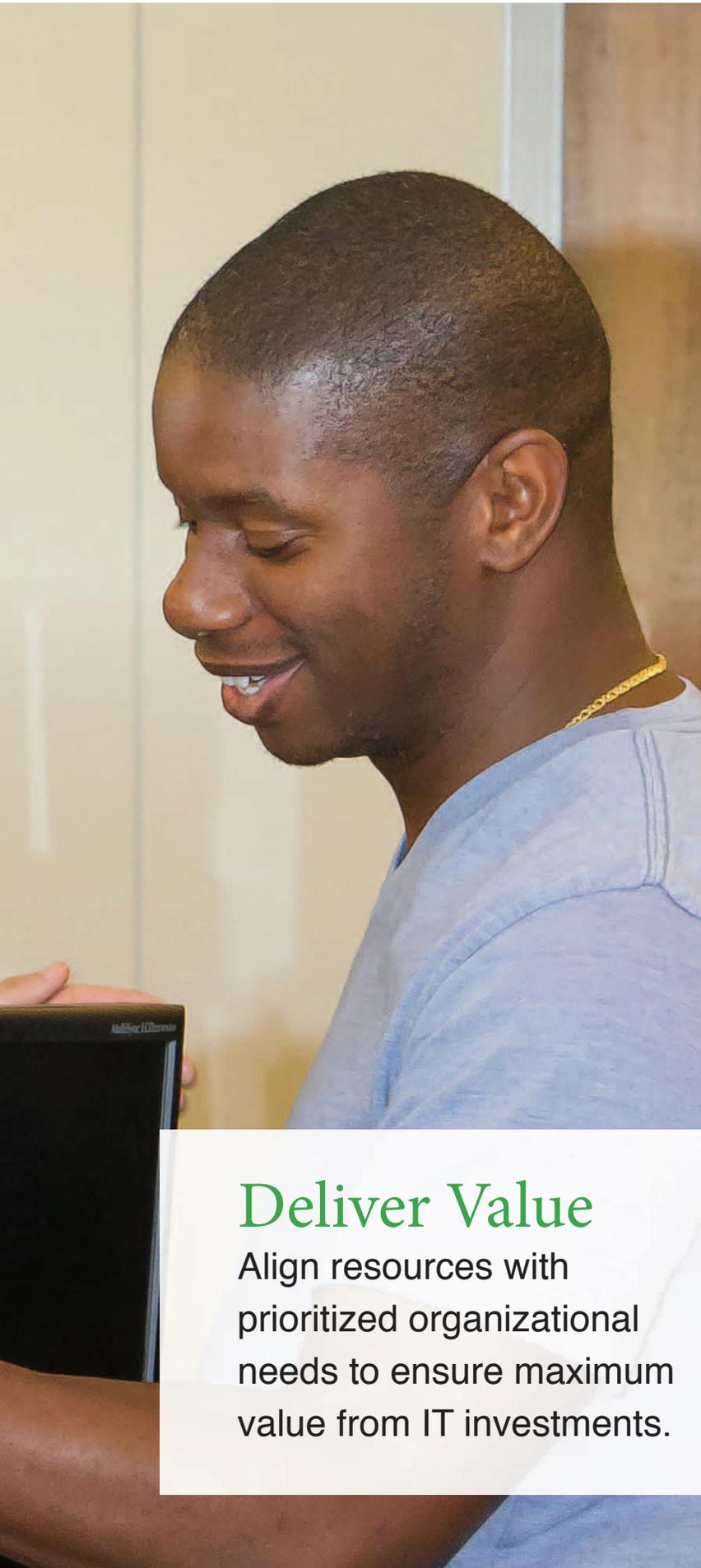
- 2.2.1 – Enhance the recruitment process to better attract candidates that embody ITSB’s Culture of Excellence.
- 2.2.2 – Infuse the selection process with techniques designed to highlight a candidate’s capability, aptitude, and potential.

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

- 2.3.1 – Explore a volunteer program where staff share and document their skills, certifications, and knowledge for future self-development opportunities.



GOAL 3
Deliver Value



Deliver Value

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

GOAL 3

Strategic Objectives & Initiatives

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

- 3.1.1 – Establish an ITSB program portfolio and process that governs IT's internal workload.
- 3.1.2 – Mature resource management capabilities to better support program portfolios.

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

- 3.2.1 – Create an executive dashboard that provides a view of key business value and performance metrics.

GOAL 4

Deliver Quality Services





Deliver Quality Services

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

GOAL 4

Strategic Objectives & Initiatives

4.1 – Understand our customers needs and offer services that conform to the customer’s expectations.

- 4.1.1 – Collaborate with customers to drive service delivery improvement for key IT services through technology and process optimization.

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

- 4.2.1 – Optimize change and release management to deliver expected quality outcomes through repeatable processes and procedures.



GOAL 5
Instill Confidence
and Trust





Instill Confidence and Trust

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

GOAL 5

Strategic Objectives & Initiatives

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

- 5.1.1 – Establish an intake process where agreements are built upon a common understanding of intent in alignment with the goals and objectives of the organization.

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

- 5.2.1 – Create a forum for staff to share information and to learn from each other.
- 5.2.2 – Develop a framework with mechanisms to promote a supportive environment for multi-level intra branch communications.

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.

- 5.3.1 – Measure rate of continuous improvement through feedback tools (e.g. surveys, interviews).

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

- 5.4.1 – Provide accurate reporting of resource commitment and material disposition to achieve fiscal transparency.

GOAL 6

Be a Strategic Partner





Be a Strategic Partner

Partner with our customers to plan and achieve business goals.

GOAL 6

Strategic Objectives & Initiatives

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

- 6.1.1 – Create a “Day in the Life” program that builds our business program acumen and enhances our ability to be a good strategic partner.
- 6.1.2 – Implement a “New ITSB Employee Orientation” program for new IT staff that builds cooperation and understanding of our roles and responsibilities.

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

- 6.2.1 – Establish collaborative forums that promote Business and IT strategic partnerships.

6.3 – Optimize our ability to deliver shared success.

- 6.3.1 – Create a blueprint within ITSB to support a business relationship team.

Strategic Planning Team

ITSB Leadership

- Liana Bailey-Crimmins
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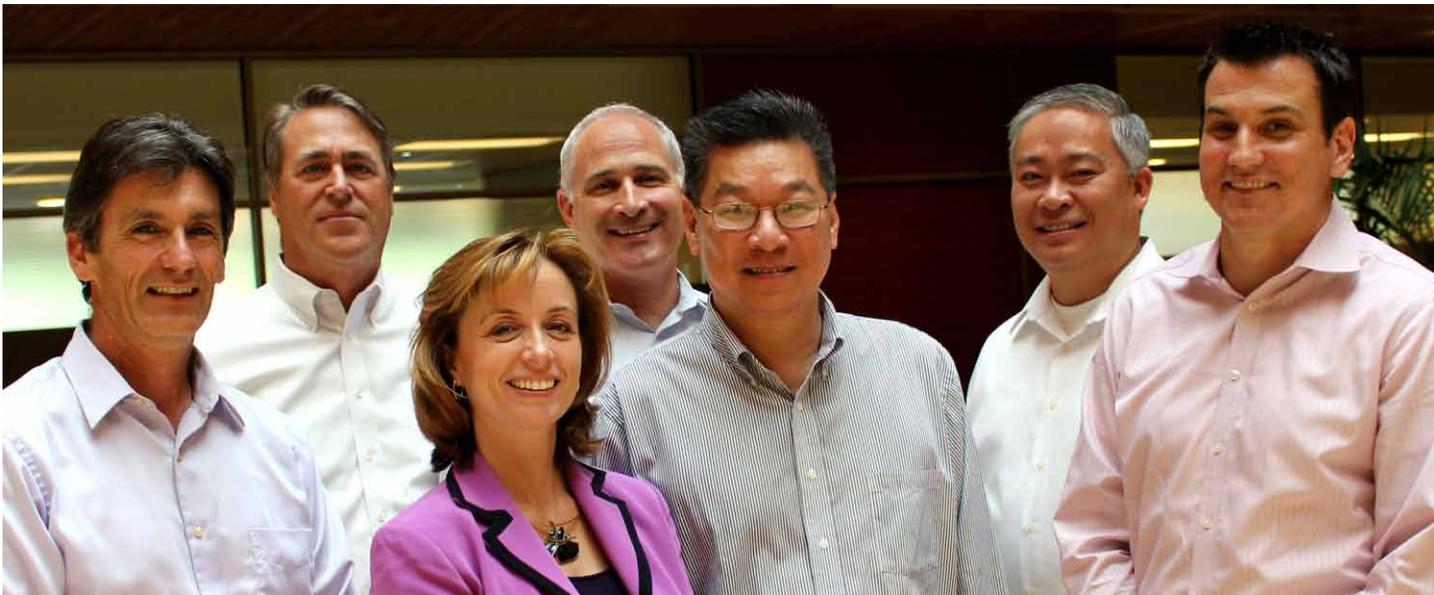
Contributors

Thank you to all who contributed to the ITSB Strategic Plan. The input you provided through All Staff meetings, Open House forums, surveys and Division meetings has been invaluable. This plan is a reflection of your dedication and commitment to excellence.

Thank You



ITSB Strategic Planning Team: CalPERS Executives, Program Partners, ITSB Leadership, and Volunteers



CalPERS CIO & ITSB Division Chiefs (from left): Andrew Warren, John Saxon, Liana Bailey-Crimmins, Christian Farland, Quoc Ha, Mike Nguyen, Timothy Taylor

CalPERS is our Business; Information Technology is our Contribution