Information Technology Services Branch

Strategic Plan
2017 - 2020
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ITSB Leadership Team
From Left: Quoc Ha, David Duarte, Dirk Benson, Timothy Taylor, Christian Farland, Andrea Spears, Jeanette Brazil, and Andrew Warren
A Message from the ITSB Leadership Team

The true value of technology is not in the technology itself but in the people behind it - the designers, implementers, and users. In this spirit, the California Public Employees’ Retirement System (CalPERS) Information Technology Services Branch (ITSB) worked closely with team members and program partners to develop the 2017-20 ITSB Strategic Plan.

Guided by an understanding of CalPERS’ business needs and the ever-evolving environment of our industry, we’ve partnered in the development of a plan that looks ahead to the next three years and beyond. In this pursuit, our goal was simple - engage all levels of employees across the enterprise to create a plan that not only builds upon our strong foundation but also establishes even greater opportunities for collaboration and continued improvement.

The richness and diversity of our state, from the landscape to the industries to the people, serve as a source of inspiration for us. It is our mission and passion to deliver the best solutions and services possible for those who serve California. The inspiration of diversity thrives from within as well. As a team, we draw strength from our innumerable experiences, backgrounds, and skill sets. While individually we each play an integral role in our organization’s success, together we cultivate a collective expertise that brings our vision and goals to life. We call this our culture of excellence.

Our three goals were developed with a thoughtful balance of enhancing our capabilities, increasing efficiencies, and strengthening our role as a trusted advisor. And just like each of us, the goals complement one another, a sum greater than each part, enabling us to become even more tightly aligned in support of business needs.

Most importantly, we believe that a strategic plan is only as good as the people who create it, implement it, and own it. We will consciously embed our mission, vision, and culture in our daily activities, making the goals come alive through our work.

We thank our team members and program partners for their many contributions and active participation in the development of this plan. The 2017-20 ITSB Strategic Plan targets substantial goals, providing an opportunity for all of us to grow and pursue excellence together, as we continue to proudly serve those who serve California.
“ITSB demonstrated their commitment to providing value by reaching out and asking the hard questions. Our working sessions were honest and constructive with dialogue that helped us identify gaps we could address to make real progress today and in the future.”

Kim Malm, Operations Support Services
Philosophies

**ITSB Vision**
A trusted advisor and sought-after partner that drives technology excellence to advance the CalPERS mission.

**ITSB Mission**
ITSB provides secure innovative technology solutions that optimize the delivery of retirement and health benefits.

**CalPERS Core Values**
Quality, Respect, Accountability, Integrity, Openness, Balance.

**ITSB Strategic Goals**

- **Goal 1: Responsive Capabilities**
  Evolve our capabilities to deliver required (core) services

- **Goal 2: Performance Excellence**
  Maximize performance, resource utilization and accountability

- **Goal 3: Trusted Advisor**
  Advise business decision-making and consistently deliver valued outcomes
“ITSB and program areas have worked together to deliver projects for many years. With this plan, we are looking at how to be more proactive, efficient, and collaborative in our solution initiation and delivery, meeting the needs of today while building for the future.”

Renee Ostrander, Employer Account Management
Goal 1: Responsive Capabilities
Evolve our capabilities to deliver required core services

Objective
Strengthen and maximize our core competencies to better serve our partners and customers today

Measure
ITSB Capability Model
Identify ITSB core capabilities (people, processes, and technology)
Target
Level 3 capabilities by end of year one

Measure
ITSB Capability Action Plans
Develop action plans based on the maturity levels identified in the ITSB capability model
Target
50 percent of capabilities with low maturity levels have an action plan developed

Measure
ITSB Capability Maturity Levels
Mature capabilities in accordance with action plans
Target
100 percent of capabilities at specified maturity levels

Objective
Evolve our competencies to be ready for the next transformation of CalPERS’ business needs

Measure
Continuous Capability Evaluation/Alignment
Identify and fill gaps in capability model
Target
60 percent of gaps have been filled (measured on an annual basis)
“Alignment to the CalPERS 2017-22 Strategic Plan is a key success factor for the ITSB Strategic Plan. By streamlining operations and looking at how ITSB will maximize performance, there is a direct connection to the CalPERS Strategic Goal of reducing complexity.”

Forrest Grimes, Enterprise Risk Management
Goal 2: Performance Excellence
Maximize performance, resource utilization and accountability

Objective
Perform according to mutually agreed upon service targets with our partners

Measure
Service Level Agreements (SLAs) for ITSB Services
Develop SLAs for entire ITSB service portfolio

Target
50 percent of ITSB services SLAs developed by year one,
100 percent of ITSB services SLAs developed by year two

Measure
Service Level Agreement (SLA) Performance Levels
Meet established SLAs at the targeted level of performance

Target
100 percent of services with identified SLAs will meet the established service level targets by year three

Objective
Improve the effectiveness and utilization of IT resources and services

Measure
Service Efficiency
Manage cost while maintaining or improving service levels;
reduce non-value-add steps in all services

Target
Downward trend of non-value-add resources on identified processes

Measure
Customer Satisfaction
Measure satisfaction of time, cost, and process utilization

Target
Identify baseline followed by upward trend

Measure
Cost Benefit Analysis
Implement cost benefit analyses for new ITSB projects or technologies

Target
20 percent of all new technology projects have a cost-benefit analysis completed prior to approval
“By reaching out across the enterprise to develop the ITSB Strategic Plan, conversations were initiated and doors were opened that allow us to dig deeper into how we can effectively and work together to achieve the goals of the organization.”

Tina Campbell, Human Resources
Goal 3: Trusted Advisor
Advise business decision-making and consistently deliver valued outcomes

Objective
Partner with the business to become a strategic asset enabling them to drive business value from IT services

Measure
Collaboration
Measure business partner satisfaction of collaboration with ITSB team members
Target
Identify baseline followed by upward trend

Measure
Strategic Partnership
Measure satisfaction of ITSB senior leadership’s advisory partnership
Target
Identify baseline followed by upward trend
Diversity by itself is not what makes ITSB a great place to work. Our shared values and commitment to one another enable us to appreciate our differences and recognize them as complementary strengths — strengths that inspire us to deliver service with excellence and integrity.