

Oregon Public Employees Retirement System

2015-17

Governor's Budget

Appendix 1 (Part 2 of 4): Program Priorities and KPMs

**Agency Presentation to the
Joint Ways & Means Committee
General Government Subcommittee**

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Executive Director**

March 16-18, 2015



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Appendix 1: Strategic Plan And Process Improvements, Supporting Documentation, And Required Reports

Appendix 1: Strategic Plan and Process Improvements, Supporting Documentation, and Required Reports

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Program Priorities Summary

#1: Retirement, Death, and Disability Program

PERS administers a single, integrated system of retirement, death, and disability benefit programs for public employees throughout Oregon. Business processes, service delivery, and support functions are integrated across the agency's divisions and third-party administrators.

#2: PERS Retiree Health Insurance Program

Provides health care insurance protection to eligible members, including a Medicare health insurance supplement. Business processes, service delivery, and support functions are integrated across the agency's divisions and third-party administrators.

#3: Deferred Compensation Program

Provides a Section 457 deferred compensation plan (OSGP) for state and local government participants to supplement retirement savings.

Program Priorities Summary (continued)

#4: Social Security Coverage Program

Federally mandated program to assist public employers who join the federal Social Security Old Age and Survivorship Program. The state is required to maintain a single point-of-contact for the program; PERS serves as that contact.

#5: Debt Service Program

PERS' debt service is for repayment of costs to build the PERS headquarters building in Tigard. Construction was completed in 1997 at a total cost of \$8.3 million. The principle payment of \$1,200,000 and interest payment of \$90,750 are scheduled for 2015-17; the debt service will be paid off by May 2017.

2014 Key Performance Measures (KPMs)

- Key performance measures (KPMs) used to gauge PERS' progress historically and with public retirement system peer group
- KPM results are used to formulate strategic and tactical plans which are, in turn, used to develop the agency's biennial budget
- KPMs and internal performance measures help guide longer-term management and agency restructuring
- CEM Benchmarking (a third-party consultant) provides analysis and peer comparisons, including activity cost, customer service, workload volume, relative complexity, and best practices
- The agency then determines and prioritizes workload processing changes and customer service enhancements

2014 Key Performance Measures (KPMs)

KPM	Status and Comments
<p>1. Timely retirement payments (percentage of initial service retirements paid within 45 days of retirement date) Target: 80%</p>	<p>Decrease: During 2014, 61% of benefit payments were issued within 45 days of retirement date, down from 70% in 2013. This decrease is related to increased volume. Mid-FY volume reached all-time highs in December 2013. Performance rebounded to 83% processed within 45 days of retirement date during the final quarter of FY2014.</p>
<p>2. Total benefit administration costs (benefit administration cost per member) Target: \$135</p>	<p>Target exceeded: Total benefit administration cost per member decreased from \$125 in 2013 to \$120 in 2014. This was well within the targeted performance of \$135 or less for 2014.</p>

2014 Key Performance Measures (KPMs)

KPM	Status and Comments
<p>3. PERS member-to-staff ratio Target: 975:1</p>	<p>Near target: Ratio decreased from 995:1 in 2013 to 973:1 in 2014, due to flat membership growth and slight staff growth (1%) with the addition of staff supporting the <i>Strunk/Eugene</i> Overpayment Recovery Project. Ratio is just under target.</p>
<p>4. Accurate benefit calculations (percentage of monthly benefits calculated to within \$5) Target: 100%</p>	<p>Approaching target: During 2014, 99% of initial service retirements were calculated accurately to within \$5 per month, up from 98% in 2013.</p>
<p>5. Percent of state employees participating in the deferred compensation program (OSGP) Target: 38%</p>	<p>Increase: State employee participation in OSGP increased from 35% in 2013 to 36% in 2014, while OSGP continues to enhance efforts to educate and remind existing and new employees of the benefits of participating in the program.</p>

2014 Key Performance Measures (KPMs)

KPM	Status and Comments
<p>6. Percent of customers rating the agency's customer service as "good" or "excellent" Target: 95%</p>	<p>Increase: 92% of members and retirees rated PERS customer service "good" or "excellent" overall in the 2014 customer satisfaction survey, up from 90% in 2013. This is short of the newly increased target of 95%.</p>
<p>7. Timely benefit estimates (percent of benefit estimates processed within 30 days of request) Target: 95%</p>	<p>Decrease: PERS provided benefit estimates within 30 days of the request 54% of the time in 2014, a decrease from 72% in 2013, mainly due to staff turnover and increased volume.</p>
<p>8. Percent of best practices met by Board of Directors Target: 100%</p>	<p>Target met: 100% of the 15 best practices criteria were met in the 2013-15 biennium, which is consistent with the previous two biennia.</p>

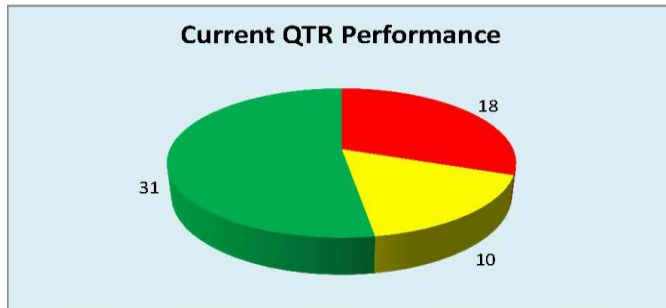
PUBLIC EMPLOYEES RETIREMENT SYSTEM Quarterly Target Review

PROCESS MEASURES: Consolidated Summary

QTR : 2014 Q4 - Quarter ended December 31, 2014

Total Process Measures: 61

Total Active Process Measures: 59



	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
OP1 Managing Client Data and Services (Y. Elledge)														
Cost [or														
OP1a	Employer reports	% reports received vs. expected	<85%	85-95	>95%	98%	↑	Monthly	Employer Svc Ctr	L. Galego	81%	89%	+	
OP1b	Returned mail	% of returned bulk mail	>15%	15-10	<10%	5%	↓	Quarterly	Aux Services	M. Moylan	1.4%	0.7%	+	
Quality														
OP1c	Employer report accuracy	% of employer reports are complete and accurate	<75%	75-85	>85%	90%	↑	Monthly	Employer Svc Ctr	L. Galego	85%	92%	+	
Time														
OP1d	Member forms on time	Average number of days to process member forms	>3	2-3	<2	1	↓	Monthly	Service Level Report	S. Paris/D. Larsen	2.8	2.9	-	Intake received 2800 more EFT's for this three month period. We also worked on a special residency project.
OP1e	Employer reports on time	% of employer reports received within 3 business days of reporting cycle	<85%	85-95	>95%	98%	↑	Monthly	Employer Svc Ctr	L. Galego	95%	92%	-	

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
OP1f	Call Wait Time	Average length of wait before caller reaches live person	>6 minutes	6-4	<4 minutes	2 minutes	↓	Monthly	Cisco	J. Lockwood	0.4	1.2	-	Oct = :49 Nov = :60 Dec = 1:52
OP1g	Correspondence response time	% of correspondence responded to within 10 days of receipt	<70%	70-80	>80%	90%	↑	Monthly	Service Level Report	R. Smith	100%	100%	=	
OP2 Collecting Contributions (K. Knoll)														
Cost [or														
OP2a	Employer payments	% of IAP contributions that are posted and paid by their due date	<85%	85-95	>95%	100%	↑	Monthly	TBD	K. Chavez	77%	73%	-	
Quality														
OP2b	Clear and accurate employer statements	% of employers that rate the employer statement as good or excellent	<75%	75-85	>85%	90%	↑	Annually	Survey	K. Chavez	95%	87%	-	The new statement format caused a significant decrease, however still in the green range.
OP2c	OSGP electronic transfer participation	% of total employers using the Automated Clearing House	<40%	40-45	>45%	50%	↑	Quarterly	ACH Report	G. Bath	48%	49%	+	Continuing to work with Local Government Employers to get them to use ACH or payroll admin. A letter will be going out with payroll admin instruction book to all LG's in Jan or Feb and we hope this gets more people using the system. All new employers are required to use payroll admin.
Time														
OP2d	Outstanding receivables report	# of invoices outstanding more than 30 days	>100	50-100	<50	25	↓	Monthly	ER Receivables Aging Report	M. Smith	607	896	-	Side Accounts are generating invoices in error.
OP2e	Purchases posted	% of member purchases posted within 14 days of receipt	<70%	70-80	>80%	90%	↑	Monthly	CSD Purchase Report	S. Paris	85%	89%	+	
OP3 Assessing Benefit Eligibility (Y. Elledge)														
Cost [or														
Quality														
OP3a	Appeals	% of appeals and contested cases that are upheld compared to total # of eligibility, disability and divorce appeals filed	<90%	90-95	>95%	100%	↑	Quarterly	PPLAD	S. Vaughn	83%	75%	-	Only 12 decisions this quarter - reversed 4 disability cases based on new medical information.
Time														

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
OP3b	Disability and divorce determinations	% of disability and divorce determinations completed in 180 and 90 days respectively	<90%	90-95	>95%	100%	↑	Quarterly	jClarety	K. Self / P. Ungern	99%	98%	-	
OP3c	Estimate KPM	% of estimate requests completed within 30 days of receipt	<75%	75-85	>85%	95%	↑	Quarterly	GBE tool	S. Paris / P. Ungern	90%	94%	+	3rd quarter improvement put us in a position to further strengthen our timeliness in the 4th quarter.
OP3d	Data Verifications Completed	% of data verifications completed within 180 days from receipt	<75%	75-85	>85%	90%	↑	Quarterly	DVU Database	E. King	0%	0%	=	During the last quarter we completed 125 DV's. The backlog at the end of the quarter is 832 DV's of which 363 are on estimated payments. Waiting to hear from the legislator on the POP.
OP4 Processing Benefit Applications (B. Harrington)														
Cost [or														
OP4a	Eligibility review completed	% of applications completed by the eligibility team within 30 days of the effective retirement	<50%	50-70	>70%	80%	↑	Monthly	statistics	B. Armatas	71%	77%	+	In addition to increasing output by 6% this quarter, the team has realized a year of year increase of 13% from Q4 of 2013 to Q4 of 2014.
Quality														
OP4b	Accuracy & completeness of application/data	% of estimated payments per month	>4%	2-4	<2%	0%	↓	Monthly	statistics	J. Cunningham & P. Ungern	4%	3%	+	trending in the right direction; still impacted by DV requests
OP4c	Returned/rejected applications	% of applications returned or rejected back to the applicant	>30%	10-30	<10%	5%	↓	Monthly	statistics	D. Larsen	1%	1%	=	
Time														
OP4e	IAP, service, & death retirement applications completed in 30 days	% of non-canceled applications completed and ready for calculation within 30 days of the effective date	<50%	50-70	>70%	80%	↑	Monthly	statistics	D. Larsen	53%	69%	+	Production was lower for Oct and Nov and started to improve in December
OP4f	Disability applications completed in 15 days	% of non-canceled applications completed and ready for calculation within 15 days of all required documents received	<95%	95-98	>98%	100%	↑	Monthly	statistics	B. Armatas	86%	79%	-	Staff availability was limited throughout Q4 of 2014. One of the three members has been out, another has been with the team for <6 months. Governance change analysis complete, proposal to be submitted to Brian H.

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
OP4g	IAP, service death & withdrawal applications completed	% of non-canceled applications completed and ready for calculation within 60 days of the effective date	<50%	50-70	>70%	80%	↑	Monthly	statistics	E. King & D. Larsen	89%	91%	+	
OP5 Calculating Benefits (B. Harrington)														
Cost [or														
OP5a	Calculations completed	# of calculations completed per FTE per day	<5	5-6	>6	7	↑	Monthly	jClarety	J. Cunningham & P. Ungern	7.3	5.1	-	Low volume of inception calcs. FTE was re-purposed to help on other eoy projects.
Quality														
OP5b	Accuracy of calculations	% of sample calculations that are accurate within plus or minus \$5	<95%	95-99	>99%	100%	↑	Monthly	jClarety	J. Cunningham & P. Ungern	97.8%	99.6%	+	
Time														
OP5c	Timely benefit calculation	% of calculations completed within 15 calendar days from completed application date	<95%	95-99	>99%	100%	↑	Monthly	jClarety	J. Cunningham & P. Ungern	93.64%	98.40%	+	trending in the right direction
OP6 Paying Benefits (K. Knoll)														
Cost [or														
OP6a	Manual checks	# of line of business manual checks processed	>15	15-5	<5	0	↓	Monthly	Check Stock Log	M. Smith	28	36	-	Continue to have increased requests for manual checks due to system functionality
OP6b	Direct deposit	% of electronic payments divided by total payments	<90%	90-95	>95%	99%	↑	Monthly	Pension Payment file	M. Smith	94%	94%	=	
Quality														
OP6c	Returned payments	Average # of days to resolve returned payments	>10	10-5	<5	3 days	↓	Monthly	Return Payment spreadsheet	M. Smith	2	2	=	

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
OP6d	Pension roll exceptions	# of exceptions not cleared prior to pension lock	>4	4-1	0	0	↓	Monthly	JClarety Pension Exception Report	J. Cunningham & P. Ungern	0	0	=	
Time														
OP6e	Tax reporting	% of tax reports completed by Federal and State deadlines	<95%	95-97	>97%	100%	↑	Quarterly	Tax reports	R. Howitt	100%	100%	=	
SP1 Communicating Internally & Externally (S. Rodeman)														
Cost [or														
SP1a	Complaints	# of emails to PERS Board email box	>60	40-60	<40	25	↓	Monthly	Email box	D. Crosley	1	4	-	
Quality														
SP1b	Form focus group	% who rate forms as easily understandable	<75%	75-85	>85%	90%	↑	Annually	Survey	D. Crosley				Measure being re-worked.
SP1c	Employee Satisfaction with communication practices	% rating satisfaction as good or excellent	<70%	70-80	>80%	90%	↑	Semi-annual	Survey	S. Rodeman	67%	65%	-	The rating of feedback from supervisors decreased by 8%.
Time														
SP1d	Public records response time	% of public records requests responded to with a cost estimate within 14 days of receipt	<80%	80-90	>90%	95%	↑	Quarterly	PR Report	A. Smith	100%	100%	=	16 request with only one requiring estimate. All request were responded to with 7 days.
SP2 Managing Compliance & Risk (S. Rodeman)														
Cost [or														
SP2a	Legal Fees	% of operating budget expended for attorney and admin hearing fees and risk management fees	>3.5%	2.0-3.5	<2.0%	1.9%	↓	Quarterly	FSD	K. Knoll	1.4%	1.5%	-	
SP2b	Total # of legal disputes	# of member and employer appeals and contested case matters, employment disputes, litigation disputes, notices of dispute and risk management claims	>60	60-51	<51	50	↓	Quarterly	PPLAD	S. Vaughn	339	317	+	We still have 60+ cases either with DOJ or on hold.
Quality														

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
SP2c	Appeal reversal rate	% of staff determinations that are reversed on appeal	>15%	15-10	<10%	5%	↓	Quarterly	PPLAD	S. Vaughn	10%	7.6%	+	
Time														
SP2d	Audit resolution time	% of high risk audit findings resolved within committed time period	<90%	90-94	>94%	95%	↑	Tri-mester	Audit Reports	J. Stanley	83%	67%	-	Small sample size. 2 of 3 recommendations completed.
SP3 Leveraging Technology (J. Masanga)														
Cost [or														
SP3a	Service Interruptions	# of business days in a month ORION systems are not available within the standard service window (mo. avg. by qtr.)	>5	3-5	<3	0.0	↓	Monthly	HEAT	S. Perry	5.3	9.3	-	28 ORION service interruptions: - 4 Early Batch starts - (4 planned, 16hrs total) - 15 Late Batch finishes (3 planned) - 4 Late Reporting DB refreshes (after on-time Batch) - 5 FileNet
Quality														
SP3b	Technology Satisfaction	% of survey respondents indicating satisfaction with our technology	<60%	60-80	>80%	85%	↑	Semi-annual	Survey	J. Masanga	88%	85%	-	Based on Nov 2014 Employee Satisfaction Survey
SP3c	ISBRA maturity ratings	# domains in ISBRA report meeting agency goal	<7	7-8	>8	11	↑	Annual	ISBRA Report	J. Stanley	8	8	=	Data as of CY 2013
SP3d	Batch incidents	# of batch incidents / abends in month (mo. avg by qtr.)	>10	10-6	<6	3	↓	Monthly	Turnover Report	S. Perry	4.0	4.7	-	
SP3e	ORION enhancement backlog count	Count of outstanding Critical and High Priority ORION Enhancement Requests (non-defect-type CRs)	>299	100-299	<100	50	↓	Quarterly	ClearQuest CMUusr database	J. Duckerin g	350	336	+	Net improvement: 14 CRs closed during this quarter - 6 jClarety releases - 2 FileNet releases
SP3f	ORION defect backlog count	Count of outstanding Critical and High Severity ORION Defects (defect-type CRs and PPCRs)	>199	100-199	<100	0	↓	Quarterly	ClearQuest CMUusr and SaberM databases	J. Duckerin g	220	219	+	- Slight net improvement: fixed defects offset by GL defects (8.2) - 6 jClarety releases - 2 FileNet releases

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
Time														
SP3g	HelpDesk responsiveness	% of HelpDesk tickets resolved within the Service Level Agreement	<80%	80-90	>90%	95%	↑	Monthly	HEAT	S. Perry	99.77%	99.83%	+	
SP3h	System uptime	% of time systems are available during the service window	<97%	97-98	>98%	100%	↑	Monthly	HEAT	S. Perry	99.39%	98.15%	-	
SP4 Managing Organizational Finance & Resources (K. Knoll)														
Cost [or														
SP4a	Cash flow management	# of months with cost/fee due to overdraft or borrowing	>1	1	0	0	↓	Quarterly	OST fund statements	R. Howitt	0	0	=	
Quality														
SP4b	Member Accounts Receivable collections	% of member accounts receivable dollars collected (based on total dollars of accounts receivable)	<50%	50-65	>65%	70%	↑	Quarterly	jClarety reports	M. Smith	43%	25%	-	New measure, in gathering data stage to determine reasonableness of information.
SP4c	Actuarial services	% of actuarial services milestones met (exp studies, valuations, CAFR data, employer rates updated, economic impact report)	<95%	95-99	>99%	100%	↑	Annually	Contract Deliverables spreadsheets; jClarety; PERS Actuary	D. Hembree				Measure being re-evaluated.
Time														
SP4d	Timely payment processing	% of invoices with payments released within 30 calendar days of receipt by Accounts Payable	<75%	75-85	>85%	90%	↑	Quarterly	SFMS	K. Knoll	96%	97%	+	
SP5 Managing & Developing the Workforce (Kyle Knoll)														
Cost [or														
SP5a	Development plans	% of employees' annual development plans created	<80%	80-89	>89%	98%	↑	Quarterly	Halogen	K. Chavez	73%	41%	-	Of the 41 evaluation completed, 17 had development plans
SP5b	Compliance	% of employees receiving corrective action for violations	>10%	6-10	<6%	0%	↓	Quarterly	Employer Labor Relations log	K. Chavez	0%	0%	=	1 employee received corrective action for policy violation
Quality														

	Measure Name	Measure Calculation	RANGE			Target	Desired Perform Trend	Data Collection Frequency	Data Source	Meas Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
SP5c	Recruiting / Onboarding	% of employees completing trial service	<85%	85-94	>94%	100%	↑	Quarterly	PPDB	K. Chavez	99%	100%	+	
SP5d	Personnel records accuracy	% of data fields entered correctly into the personnel database (PPDB)	<90%	90-94	>94%	100%	↑	Quarterly	PPDB	K. Chavez	100%	100%	=	
SP5e	Overall employee performance	% of employees evaluated overall performance rating "meets expectations"	<80%	80-90	>90%	100%	↑	Quarterly	Halogen	K. Chavez	100%	88%	-	5 of the 41 completed, received a rating lower than "meets expectations."
Time														
SP5f	Timely performance evaluations	% of performance evaluations completed by due date	<80%	80-90	>90%	100%	↑	Quarterly	Halogen	K. Chavez	11%	63%	+	Of the 77 evaluations due, 41 were completed. Of the 41 completed, 26 were completed on time.
SP6 Strategic & Operational Planning (S. Rodeman)														
Cost [or														
SP6a	Data Reported	% of outcome and process measures with new or current data reported for that quarter	<35%	35-50	>50%	75%	↑	Quarterly	Scorecards	M. Rickard	91%	89%	-	
SP6b	Problem Solving Initiatives in process	# of problem solving initiatives in process	<4	4-8	>8	10	↑	Quarterly	Central	S. Rodeman	2	1	-	Disability Appeals was the only problem solving initiative active in the 4th quarter.
Quality														
SP6c	Mission Relevance	% of employees rating somewhat or completely agree to questions 12, 14 & 16 on employee engagement survey	<60%	60-80	>80%	85%	↑	Semi-annual	Employee Engagement Survey	S. Rodeman	87%	83%	-	
SP6d	Performance Improvement	Net # of measures that improve per each QTR	<5	5-15	>15	20	↑	Quarterly	Scorecards	M. Rickard	17	-2	-	Quarter 3 was a high point for performance across the board. Many decreases this quarter were slight.
Time														
SP6e	Breakthrough Schedule	# of breakthroughs	<2	2	>2	3	↑	Quarterly	Central	S. Rodeman	4	4	=	

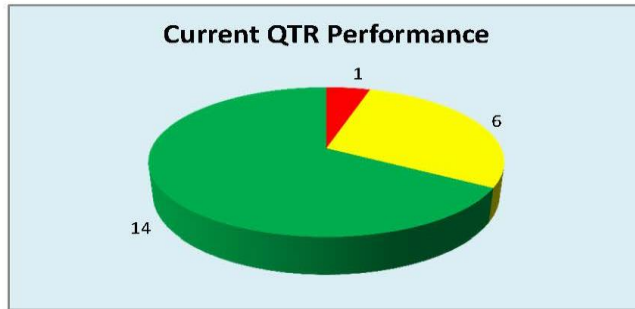
PUBLIC EMPLOYEES RETIREMENT SYSTEM
Quarterly Target Review

OUTCOME MEASURE SUMMARY

QTR : 2014 Q4 - Quarter ended December 31, 2014

Total Outcome Measures: 21

Total Active Outcome Measures: 21



No.	Measure Name	Measure Calculation	RANGE			Target	Desired Perform. Trend	Data Collection Frequency	Data Source	Measure Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
O1: Clear/Concise Communication										Y. Elledge				
O1a	Member/Employee satisfaction	% rating satisfaction good or excellent	<75%	75-89	>89%	95%	↑	Annual	Survey	Y. Elledge	88%	91%	+	Based on FY2014 survey data
O1b	Service retirement application satisfaction	% rating satisfaction as good or excellent	<75%	75-89	>89%	95%	↑	Monthly	Survey	Y. Elledge	79%	77%	-	
O1c	Call escalations	% of calls referred to Team One follow-up vs. total call volume	>4%	3-4	<3%	2%	↓	Monthly	Call Center	Y. Elledge	1.7%	1.4%	+	
O2: Employee Engagement										S. Rodeman				
O2a	Selected Human Resource core process measures	% of SP5 pms are in green status (a, c, e, & f)	<50%	50-68	>68%	100%	↑	Quarterly	Scorecard	S. Rodeman	50%	25%	-	Overall Employee Performance dipped into yellow. Only Recruiting/Onboarding in the green.
O2b	Progress on scorecard measures	% of process measures in Agency Scorecard that improve from previous quarter	>5%	5-9	<9%	10%	↑	Quarterly	Scorecard	S. Rodeman	49.2%	33.9%	-	

No.	Measure Name	Measure Calculation	RANGE			Target	Desired Perform. Trend	Data Collection Frequency	Data Source	Measure Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
O2c	Organizational climate assessment	Average percent of employees rating somewhat or completely agree on Q 2a.-c., 4f., 8b., 10a.-c. and 18a.-e. on the Employee Engagement Survey	<60%	60-80%	>80%	90%	↑	Semi-annual	Survey	S. Rodeman	76%	73%	-	Ratings were slightly down across the board by an avg of -2.6%. Improved ratings in 2 categories: Open & Clear Commun throughout Agy (+2.8%) and Pride in Agy (+5.7%).
O2d	Breakthrough teams composition	% of breakthrough team members that are classified staff	<40%	40-70	>70%	80%	↑	Quarterly	Breakthrough Team rosters	S. Rodeman	61%	61%	=	No changes to teams.
O3: Operating Effectiveness - % green process measures										S. Rodeman				
O3a	% of Measures in "Green"	% of Outcome and Process Measures in the "green" range as of a particular date	<40%	40-55	>55%	65%	↑	Quarterly	Scorecard	S. Rodeman	60%	56%	-	
O4: Member to Staff Ratio										S. Rodeman				
O4a	Member to Staff Ratio	Total Members divided by total approved agency FTE	<900	900-920	>920	925	↑	Annual	Actuarial val. & PICS reports	S. Rodeman	995	973	-	Based on FY14 data
O5: Benefit Administration Cost										S. Rodeman				
O5a	Benefit admin cost per member	CAFR administrative expenditures divided by total membership	>\$140	\$135-\$140	<\$135	\$130	↓	Annual	CAFR & Actuarial val.	S. Rodeman	\$125	\$120	+	Based on FY14 data
O6: Performance to Budget										K. Knoll				
O6a	Projected variance % of operating budget	Projected operating budget biennial variance divided by total limited budget	<1.0%	1.0-1.9	>1.9%	2% of budget limitation	↑	Monthly	SFMS; budget reports	K. Knoll	2.0%	2.8%	+	
O7: Member Satisfaction										Y. Elledge / B. Harrington				
O7a	Customer Service Satisfaction	Members rating satisfaction with agency's customer service as "good" or "excellent"	<70%	70-89	>89%	95%	↑	Annual	Survey	Y. Elledge / B. Harrington	90%	92%	+	Based on FY2014 survey data

No.	Measure Name	Measure Calculation	RANGE			Target	Desired Perform. Trend	Data Collection Frequency	Data Source	Measure Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
O7b	Retirement Application Assistance Session (RAAS) satisfaction	Members rating satisfaction with agency's customer service on a selected transaction as "good" or "excellent"	<70%	70-80	>80%	95%	↑	Quarterly	Survey	Y. Elledge / B. Harrington	100%	100%	+	
O8: Effective Employer Partnerships										Y. Elledge				
O8a	Employer satisfaction	Employers rating satisfaction with agency's customer service as "good" or "excellent"	<70%	70-89	>89%	95%	↑	Annual	Survey	Y. Elledge	85%	89%	+	Based on 2014 survey data
O8b	Employer Workshop satisfaction	Employers rating satisfaction with agency's employer workshop as "good" or "excellent"	<70%	70-89	>89%	95%	↑	Quarterly	Survey	Y. Elledge	94%	93%	-	
O9: Timely Benefit Payments										B. Harrington / Y. Elledge				
O9a	Timely service retirement benefit payments	New PERS and OPSRP retirees that receive first payment within 45 days of effective retirement date	<40%	40-59	>59%	80%	↑	Monthly	Clarety 238 status report	Y. Elledge / B. Harrington	64%	77%	+	
O9b	Timely first benefit payment all others	New payees (withdrawals; disability retirees; beneficiaries) who receive payment within service goals	<70%	70-89	>89%	90%	↑	Monthly	Clarety 238 status report; Service Level report	Y. Elledge / B. Harrington	96%	85%	-	Withdrawals had staffing issues, SD13 issues prevented some timely payments, and the need to collect new Tax Acknowledgments from a large population delayed other payments.
O10: Informed Retirement Decisions										Y. Elledge				
O10a	Retirement process satisfaction	Retirees rating satisfaction with the retirement process	<70%	70-84	>84%	90%	↑	Quarterly	Survey	Y. Elledge	83%	84%	+	
O10b	Retirement changes	% of retirement appeals, disputes, options changes divided by total number of retirements	>10%	5-10	<5%	2%	↓	Quarterly	Appeal, dispute and option change stats (report TBD)	Y. Elledge	2.8%	2.3%	+	1375 total retirements; 31 appeals, disputes and changes.
O11: Accurate Benefit Calculations										B. Harrington				

No.	Measure Name	Measure Calculation	RANGE			Target	Desired Perform. Trend	Data Collection Frequency	Data Source	Measure Owner	Last Status	Current Status	Trend	Corrective Action & Comments
			Red	Yellow	Green									
O11a	Accurate benefit calculations	% of calculations accurately calculated to within plus or minus \$5	<95%	95-97	>97%	100%	↑	Annual	Internal or external audit sampling	B. Harrington	98%	99%	+	
O11b	Audit findings / internal sampling	% of internal sampling that reveals any errors in calculations	>5%	3-5	<3%	0 errors	↓	Monthly	RSS and SSS QA sampling	B. Harrington	1.2%	0.4%	+	