

Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR's website does not indicate CalHR support for the proposal.

A. GENERAL INFORMATION

1. Date

02/20/2019

2. Department

California Public Employees' Retirement System

3. Organizational Placement (Division/Branch/Office Name)

Customer Services and Support/ Customer Education and Outreach Division

4. CEA Position Title

Chief, Customer Education and Outreach Division

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The Chief, Customer Education and Outreach Division (CEOD) has full management responsibility for the operation of the CEOD, which is the primary source of education and training for all members and employers and is responsible for providing in-person counseling and guidance regarding membership, employer services, retirement, and health benefit related issues to active and inactive members, retirees, survivors, employers, and the general public. CEOD is comprised of the Internal Training Services section, the External Education Services section, and eight Regional Offices located throughout California, and serves over 206,000 members and employers annually through customer contacts and educational events. The Chief, CEOD provides executive leadership, strategic and policy direction on a broad spectrum of member, employer, retirement, and health issues central to the CalPERS mission.

6. Reports to: (Class Title/Level)

Deputy Executive Officer (DEO)/CEA, C

7. Relationship with Department Director (Select one)

- Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.
- Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

(Explain): The CEA works in coordination with the DEO, who is a member of the CalPERS Executive Management Team.

8. Organizational Level (Select one)

- 1st
- 2nd
- 3rd
- 4th
- 5th (mega departments only - 17,001+ allocated positions)

B. SUMMARY OF REQUEST

9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

The Chief, CEOD has a major role in the formulation of departmental policies, planning, and program implementation to further CalPERS' mission to deliver retirement and health care benefits to members and their beneficiaries. The Chief oversees the provision of education, outreach, and retirement and benefit counseling services to over 206,000 million members annually, as well as State agencies and over 3000 member agencies via eight field offices. This includes classroom and computer-based education to members and employers on CalPERS retirement and health care benefits, regional CalPERS Benefit Education Events (CBEEs), and an annual Education Forum. The Chief, CEOD is responsible for meeting CalPERS' Strategic Plan (2017-2022) goal of 95 percent customer satisfaction/experience rating on educational offerings and in-person counseling at field offices. The Chief oversees the development and delivery of comprehensive training for analysts in the Customer Experience Division's Customer Contact Center (CCC) and Education Contact Center (ECC) as well as field office team members. This requires extensive and continuous collaboration with other CEA's in various CalPERS programs administering retirement and health care benefits. The Chief, CEOD administers the Knowledge Management System, ensuring front-line customer service employees have access to updated information and procedures related to CalPERS business, retirement law, and health care policy. The Chief, CEOD develops and implements policy relating to service credit purchases, service and disability retirement benefits, survivor benefit claims as well as all aspects of State and member agency education and outreach. The Chief, CEOD is a member of the CalPERS Senior Management team which is responsible for providing program and policy direction, carrying out the CalPERS Strategic Plan and formulating and implementing department-wide policies related to all CalPERS programs. This position is also responsible for working with external employer, employee, and member groups in the establishment of departmental policies, and for maintaining a high level of communication with employers and members regarding policy and program implementation.

B. SUMMARY OF REQUEST (continued)

10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- Program is directly related to department's primary mission and is critical to achieving the department's goals.
- Program is indirectly related to department's primary mission.
- Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: CalPERS' mission is to deliver retirement and health care benefits to members and their beneficiaries. CalPERS is the largest and most complex pension system in the nation, and members must make multiple decisions throughout their career to ensure a secure and healthy retirement. The role of the Chief, CEOD is critical to this mission.

The Chief develops and implements policies for delivering education and outreach to members and employers on retirement and health care benefits so that members can make informed choices and employers correctly administer those benefits within their scope of responsibility. For example, the Chief, CEOD developed a policy regarding best practices in Computer Based Training (CBT) to ensure digital learning appropriately and cost-effectively equips CalPERS members and business partners to interact successfully with the System. Another policy example concerns the provision of Adult Learning Principles in CRT's, instructor-led classroom training, CBEEs, benefit fairs and Education Forum presentations. This policy has led to increased financial literacy for CalPERS members and decreased findings in compliance audits for business partners. New policies are developed based on direction from the Board of Administration or the Chief Executive Officer, such as a policy to remove redundant information from employer program guides to decrease printing costs, and another policy to streamline class lengths to expand the number of educational courses offered to members.

The Chief, CEOD, develops and implements policies for delivering instruction, refresher, and just-in-time training to CalPERS front-line customer service team members, ensuring they are equipped to educate members about their retirement and health care benefits.

The Chief designs, implements, assesses, and continually refines education offerings and outreach campaigns and strategies based upon customer feedback, new legislation or Board direction, program changes, enhancements to the my|CalPERS system, new contact center technologies, and industry best practices.

B. SUMMARY OF REQUEST (continued)

11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

This request is part of a larger proposed restructuring of the 1,050 person Customer Services and Support (CSS) Branch. CalPERS' Strategic Plan (2017-2022) affirms the critical role of CSS in fulfilling the Department's mission to deliver retirement and health care benefits to over 1.9 million members and their beneficiaries. As the customer service arm of CalPERS, CSS must reorganize to deliver services in the least complex, most efficient manner possible. Additionally, the reorganization will allow CSS to increase the speed and effectiveness of decision-making, better identify and manage risk, improve accountability and transparency, and reduce reliance on consultants as leaders will have more bandwidth to direct strategic initiatives and resulting projects. The Customer Service and Outreach Division within CSS is the second largest division in CalPERS, with nearly 400 employees reporting to one CEA B. The scope and span of the Chief, CSOD's responsibilities are not equitable with that of other positions at this level in other State departments or within CalPERS, and does not allow the needed focus on strategic plan goals of reducing costs and complexity in service delivery. The proposed creation of the Chief, CEOD position, in conjunction with the re-envisioned Chief, Customer Experience Division (CED) position will ensure each CEA B has a more reasonable span of control allowing them to manage increasing customer demand due to increased members reaching retirement while implementing strategies to reduce administrative costs while maintaining CalPERS' exceptional level of customer satisfaction.

C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The Chief, CEOD develops and implements policies for delivering education and outreach to members and employers on retirement and health care benefits so that members can make informed choices and employers correctly administer those benefits within their scope of responsibility. For example, the Employer Education Evolution policy ensures continual improvement to business partner curricula, partnering with the Employer Account Management Division to target employers with compliance audit findings for tailored classes, and data analysis to link education attainment with reduced audit findings. The Chief, CEOD collaborates with the Deputy Executive Officers of the Customer Services and Support Branch and the Communications and Stakeholder Relations Branch to ensure member and employer benefit education fairs, employer trainings, member trainings, publications, instructional videos, webinars and computer based trainings reflect current statute and regulations; CalPERS strategic goals, such as member financial literacy; CalPERS branding; and assist stakeholders in successfully navigating CalPERS retirement and health care programs, measured by customer satisfaction surveys.

CalPERS' outreach and education program has a substantial impact to CalPERS members and their families and business partners throughout the State. By providing the tools and education for members to make financially responsible retirement and health care decisions, and by ensuring the efficient administration of retirement and health care programs, the Chief, CEOD contributes to a physically and fiscally healthy population of retirees in California.

Field Office Administration: The Chief, CEOD, establishes and continually improves operational policies for day-to-day functioning of eight field offices that provides one-stop assistance with retirement planning and health care decision-making for CalPERS members in their local communities. The Chief is responsible for developing staffing policies to ensure adequate coverage and short wait times; for developing robust and ongoing training in CalPERS business process and soft skills/customer service for field office team members and for ensuring all administrative responsibilities of each office, such as procurement, facilities management, fleet management, and information technology equipment management, are managed in a fiscally responsible manner. Examples of policies developed by the Chief include, Point of Service Feedback, which allows customers to provide real-time inputs on their level of satisfaction during field office visits; and Counter Counseling for Service Retirement, which ensures consistent and essential retirement advice is provided in a streamlined and efficient manner to members visiting any field office throughout the State.

CalPERS members rely on in-person assistance during their journey to retirement. The field offices provide highly-valued services in retirement planning, retirement option selection, beneficiary selection, survivor benefits, disability retirement and other processes within members' regional areas throughout the State.

Knowledge Management: The Chief, CEOD develops all policies required to employ a robust Knowledge Management System (KMS) outlet used by the CEOD and the Customer Experience Division to effectively serve members and business partners. KMS policies control the process of creating, sharing, using and managing CalPERS information, procedures, and policies through the Contact Center News Network (CCNN) platform. The Chief, CEOD runs the CCNN program and is responsible for creating, refining and updating policies to ensure CalPERS knowledge assets are used in a multidisciplinary approach to achieving the Enterprise's mission and strategic objectives. There are presently several hundred procedures, policies or informational documents within the CCNN platform, including Authenticating Customers and Retirement Options Simplification.

C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

The Chief, CEOD is a member of the CalPERS senior management team, which is responsible for providing program and policy direction, carrying out the CalPERS Strategic Plan, and formulating and implementing department-wide policies related to retirement and health care programs. This position is also responsible for working with external employer, employee, and member groups in the establishment of departmental policies, and for maintaining ongoing communications with employers and members regarding policy and program implementation. More specifically, the Chief, CEOD is the primary decision-maker regarding outreach and education to members and employers, the CCC Quality Assurance Program, and all administrative operations in eight field offices.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

Both.

The CEOD is a well-developed but continually improving operation which must be agile and responsive to evolving customer needs, technological advancements, and business partner demands. Much of the policy work in the Outreach and Education program and field operations requires periodic assessment and refinement. Additionally, new legislation, directives from the Board of Administration, and/or CalPERS strategic plan initiatives may drive the need for new policy creation.