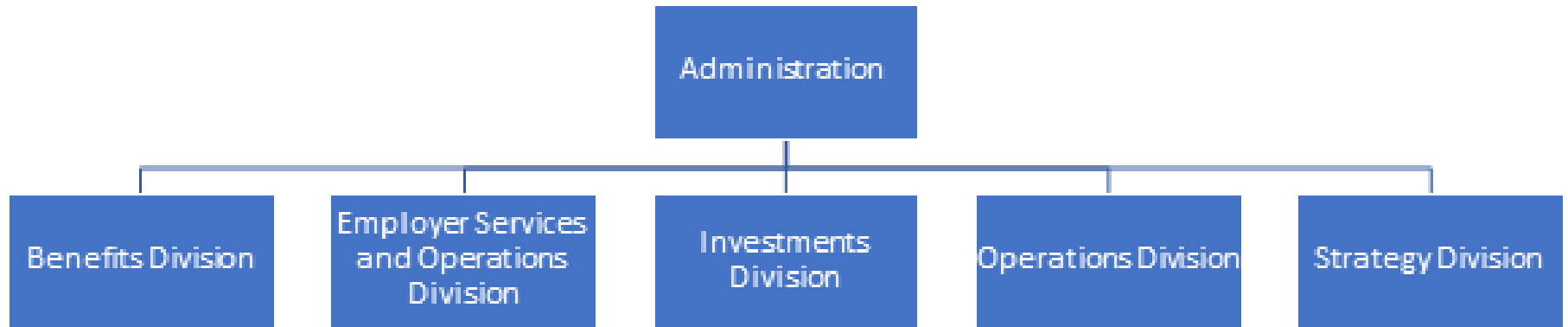


# IPERS Organizational Chart



## FY2025 IPERS Organizational Plan

<b>Administration (Governance)</b>	IPERS' Administration ensures that all staff and programs fulfill IPERS' mission of acting exclusively in the members' best interest and as the fiduciary responsible for administering the trust fund that pays member benefits.	
<b>Strategic Initiative</b>	Work with legal experts, the Governor, the legislature and the IPERS Investment Board to resolve important ambiguities in the governance structure of the IPERS Trust Fund.	
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Create a list of governance questions to answer.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before the second quarter of FY2025, develop a comprehensive list of questions that would have to be answered to resolve IPERS' governance ambiguities.	List is developed.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Obtain legal opinions on each question raised in Goal 1.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before the fourth quarter of FY2025, obtain legal opinions answering the questions raised. The legal opinions should indicate where ambiguities are not resolvable under current laws and regulations, and indicate where the resolution or ambiguities can be done through administrative actions, including those that would require legislation.	Legal opinion is obtained.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Complete administrative actions, where sufficient, to resolve IPERS' governance ambiguities.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before the third quarter of FY2026, conclude discussion and reach administrative agreement on governance questions that can be resolved through administrative actions.	N/A
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Enact legislation, as required, to resolve IPERS' governance ambiguities.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before the third quarter of FY2027, propose any legislation necessary to resolve IPERS' governance ambiguities.	N/A
	Before FY2029, enact the legislation needed to resolve IPERS' governance ambiguities or, alternatively, fail to enact legislation but conclude that ambiguities are acceptable.	N/A
<b>Investments (Funding)</b>	The Investments Division executes the Board-approved asset allocation plan and strives to add value relative to the policy benchmark while staying within the Board's tolerance for active risk.	
<b>Strategic Initiative</b>	Achieve actuarial milestones on the path to full funding and maintain stable or achieve reduced contribution rates.	

	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Achieve a funded ratio of 100% no later than the beginning of FY2045 and maintain current Regular member contribution rates until FY2037, when IPERS is expected to be 95% funded and may lower rates per the Contribution Rate Funding Policy.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Earn 7% investment returns annually.	Investment return equals 7%.
	Earn 10 bps (0.1%) of excess investment returns annually.	10 bps of excess returns achieved.
	Before the beginning of FY2026, achieve a funded ratio of 90.2%.	Funded ratio is 90.2%.
<b>Benefits (Service Delivery)</b>	The Benefits Division is responsible for providing customer service to IPERS members throughout their retirement journey and for processing various member actions, including all forms and applications.	
<b>Strategic Initiative</b>	Modernize and improve all facets of service delivery using multiple methods, including in-person, virtual and digital.	
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Before FY2026, implement new customer service software that uses cutting-edge technology to more efficiently delivery member services by phone and digitally.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before FY2028, increase IPERS' Service Score for active member experience from 61 to the peer median of 76.	Service Score increases to 64.
	Before FY2026, introduce a chatbot, live web chat and the ability to request a callback to increase the contact center capability service score by 10 points.	Contact center service score increases by 10 points.
	Before FY2027, reduce the time it takes callers to reach a service agent from 500 seconds to the peer median of 468 seconds.*	Amount of time is reduced to 464 seconds.
	Before FY2028, reduce the percentage of calls with undesired outcomes from 20.2% to the peer median of 16.8%.	Undesirable outcomes are reduced to 19%.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Before FY2030, offer all IPERS applications digitally.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Grow the number of applications received digitally by 15% annually, achieving receipt of 75% of applications digitally by FY2030.	15% of applications are received digitally.
	Before FY2026, offer the Application for IPERS Retirement Benefits for Regular members digitally.	Application is available.
	Before FY2027, offer the Application for Service Purchase digitally.	N/A
	Before FY2027, offer the refund application digitally	N/A
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Before FY2026, implement a robust survey program to gather actionable feedback to enhance IPERS' service to members.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Before FY2026, implement surveys to new members, secure website users, members who have called IPERS and members who have received one-on-one retirement counseling.	100% of surveys are implemented.
	Before FY2026, increase the feedback service score from 15 to the peer median of 58.	The feedback service score is 58.

	Achieve a 15% average survey completion rate.	Survey completion rate is 15%.
	At least 80% of survey respondents say they are “mostly satisfied” or “completely satisfied” with the service they received from IPERS.*	80% of survey respondents are “mostly satisfied” or “completely satisfied.”
	At least 80% of survey respondents say they “agree” or “strongly agree” that IPERS made it easy for them to complete the transaction about which they contacted IPERS.	80% of survey respondents “agree” or “strongly agree.”
<b>Operations</b>	The Operations Division is responsible for ensuring IPERS’ workforce is appropriate to meet its operational needs; for managing technology-related programs that ensure the security of member data; for developing and implementing systems to prevent fraud; for risk management and compliance; for internal and payroll audits; for updating, revising and documenting all IPERS policies; for document retention and for managing a finance program that facilitates the accurate and secure payment of benefits.	
<b>Strategic Initiative</b>	Bolster IPERS’ business process to ensure the security of member data, the accuracy of payments and the overall quality of performance.	
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Beginning in FY2025, IPERS will coordinate with OCIO to engage in an independent IT security audit of IPERS technology-related processes and a penetration test on IPERS technology infrastructure annually on alternating years.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Achieve at least a passing score on each security engagement.	Passing score is achieved.
	Address 100% of deficiencies reported in each security engagement within 12 months.	100% of deficiencies are addressed.
	Achieve scores from each security engagement that demonstrate improvement and trend in a positive direction.	Scores in each portion of the security assessment are improved.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Evaluate the technology tools and practices used to protect sensitive member data at least twice annually and develop a work plan within 60 days to implement enhancements to meet rapidly changing security threats.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	100% of IPERS staff will participate in security training annually.	100% of IPERS staff participate in security training.
	100% of IPERS staff will achieve a passing score in the annual security training.	100% of staff achieve a passing score.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> 100% of IPERS’ pension estimates and pension benefits are paid accurately.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	IPERS’ Project Management Office will continue the best practice of testing 100% of changes to the pension administration system prior to release to production to ensure calculations and payments remain accurate.	100% of changes are tested.
	Benefits staff will continue the best practice of ensuring 100% of payrolls are verified for accuracy of data by reviewing pre-payroll reports and performing reconciliation of report data and remove inaccurate or questionable payments prior to disbursement.	100% of payrolls are verified for accuracy.

	Beginning in FY2025, Benefits staff will review documented policies and procedures related to payroll processes at least annually and revise as necessary.	Number of documented policies and procedures related to payroll processes are reviewed.
	Beginning in FY2025, Compliance Division staff will audit payroll processes at least annually and assign responsibility for addressing any noted deficiencies within 12 months.	Number of policies reviewed and revised.
<b>Operations (Workforce)</b>	The Workforce Bureau of the Operations Division ensures that IPERS' workforce is appropriate to meet its operational needs.	
<b>Strategic Initiative</b>	IPERS members will engage with a highly committed, professional and knowledgeable workforce supported by appropriate job classifications, compensation plans, professional development and growth opportunities throughout their careers at IPERS.	
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Continually review job classifications and associated compensation for IPERS' workforce.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Review 100% of vacant positions internally to determine how the position will best serve IPERS and request an appropriate job classification.	100% of vacant positions are reviewed.
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Create a professional growth and development plan for all IPERS staff.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	Beginning in FY2025, 100% of employees have a documented Individual Development Plan that is created in consultation with supervisors.	100% of employees have a documented Individual Development Plan.
	Beginning in FY2026, 100% of IPERS employees will participate in at least 20 hours of training and development annually.	N/A
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Use member surveys to capture member sentiments on engagement with IPERS workforce.</li> </ul>	
	<b>Key Performance Indicator</b>	<b>FY2025 Metric</b>
	At least 80% of survey respondents say they are "mostly satisfied" or "completely satisfied" with the professionalism and knowledge demonstrated during their most recent engagement with an IPERS professional.	80% of survey respondents say they are "mostly satisfied" or "completely satisfied."
<b>Strategy</b>	The Strategy Division uses qualitative and quantitative data and stakeholder input to chart IPERS' strategic direction and develops plans to communicate with and educate members, retirees and staff to elevate IPERS' performance and reputation.	
<b>Strategic Initiative</b>	Thoroughly explore IPERS' member's journeys to retirement and use that knowledge to identify new strategic opportunities for enhanced, innovative stakeholder education and the development of relevant digital tools.	
	<ul style="list-style-type: none"> <li>• <b>Goal:</b> Before FY2026 implement a strategy to discontinue ground mail delivery of most IEPRS documents and transition to digital delivery.</li> </ul>	

Key Performance Indicator	FY2025 Metric
Before FY2026, implement a monthly direct mail campaign that motivates 20% of respondents who have not activated their member self-service account to do to access documents digitally.*	20% of direct mail recipients activate My Account.
Reduce paper and postage costs by 15% annually, achieving a 75% reduction by FY2030.	15% reduction in paper and postage costs.
<ul style="list-style-type: none"> <li>• <b>Goal:</b> Using qualitative and quantitative data, define key points in the member’s journey from entering public workforce through death, and use the information to create a comprehensive member education program that is delivered based on the unique needs of the audience.</li> </ul>	
Key Performance Indicator	FY2025 Metric
Annually through FY2030, increase the number of IPERS members who receive education from IPERS by 10%.	The number of members who receive education from IPERS increases 10%.
Annually through FY2030, add at least two new educational opportunities for IPERS members.	Two new educational opportunities are added.
Before FY2026, implement a direct mail campaign to members as they achieve major milestone along the retirement journey to help them understand the milestone’s implication to their retirement benefits and to build relationships.	Direct mail campaign implemented.
Before FY2030, increase the Targeted Campaigns Service Score from 44 to the peer median of 49.	The Targeted Campaigns score increases to 45.
<ul style="list-style-type: none"> <li>• <b>Goal:</b> Create an education program for IPERS employees so they feel valued, are engaged, understand the agency’s strategic plan and their role in achieving it, and understand the agency’s operations and how their work supports it.</li> </ul>	
Key Performance Indicator	FY2025 Metric
100% of new IPERS employees receive training about the agency’s operations.	100% of employees receive training about IPERS’ operations.
Twice annually, IPERS distributes an employee survey to determine what education and support the program must provide.	Surveys are distributed twice annually.
At least quarterly, IPERS’ CEO and applicable leaders and staff will host targeted and/or all-staff meetings or events to communicate relevant information and invite employee questions.	Four meetings are held.
Before FY2027, implement an emerging leaders’ program for select IPERS staff.	N/A

\* Metrics included on IGOV dashboard.