

OREGON PERS

PUBLIC EMPLOYEES RETIREMENT SYSTEM



2023-2028 **Strategic Plan**

Updated September 2025

MISSION STATEMENT



PUBLIC EMPLOYEES RETIREMENT SYSTEM



We serve the people of Oregon by
administering public employee
benefit trusts to pay the right person
the right benefit at the right time.

SHARED VISION

Honoring your public service through secure retirement benefits.

CORE VALUES

Service-focus

We work together to meet the needs of others with dependability, professionalism, and respect.

Accountability

We take ownership for our decisions, actions, and outcomes.

Integrity

We inspire trust through transparency and ethical, sound judgment.

OPERATING PRINCIPLES

Professional

We are responsive, respectful, and sensitive to the needs of our members, employers, and staff.

Accurate

We ensure data integrity and provide consistent, dependable information and benefits.

Judicious

We use sound judgment and prudent, principled decision-making in upholding our fiduciary responsibility.

Vigilant

We are constantly vigilant and take ownership in the basic tenets of information security: confidentiality, integrity, and availability.

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STRATEGIC PLAN INTRODUCTION

The planning process

Since 2013, PERS has traditionally built out our strategic plans using a five-year framework. This is an interim update three years into our 2023-2028 timeframe to ensure that any new environmental conditions are integrated into the plan. To meet Governor Kotek's expectations for state agencies, to effectively manage public resources, and to support existing customer-focused priorities, PERS leadership chose to build on the current plan as our interim update, keeping PERS vision, values, and operating principles the same. A more fulsome process will be undertaken as part of building out our 2028-2033 Strategic Plan.

This interim update was based on conversations and insights the agency received from the PERS Board, member and employer engagement surveys, conversations with the PERS Employer Advisory Group, other parties including the Governor's policy advisor, and PERS staff.

Additionally, the PERS Diversity, Equity and Inclusion Plan, Affirmative Action Plan, Succession Plan, Information Technology Strategic Plan, and Governor Kotek's agency expectations all served as resources for this update.

Translating words into action

This strategic plan looks to a five-year horizon and answers the question: If we are to become better at delivering on our mission, what will we, as an agency, be able to improve over time?

We recognize that we must reimagine how we evolve and deploy our business capabilities via our people, processes, and technologies. This evolution is necessary to meet our member and PERS-participating employer needs into the future. Members and employers have a desire for more personalized and updated service delivery, such that they can be informed, interact, and transact with PERS at the time of their choosing, using the channel of their choice.

Since the inception of this strategic planning period in January 2023, PERS has engaged in a comprehensive review of our approach to modernizing PERS. To that end, we have added an additional strategic pillar, Modernization. This pillar will set out our goals and objectives in this regard, in addition to and in alignment with the other six pillars. PERS has also set up a distinct organizational division to lead and support the modernization efforts headed by its own administrator and staff.

The plan articulates ambitious goals to achieve through 2028 within these focus areas, with specific, achievable goals and objectives related to each. The plan also links our objectives to the core outcome and process measures documented in the PERS Fundamentals Map, a key artifact in the PERS Outcome-Based Management System.

Our tactics to achieve these goals and objectives leverage the resources any organization must use in order to enact change — people, process, and technology — but unify and prioritize the allocation of these resources to assure that they are directed consistently and productively to achieve our desired outcomes.

Achieving the goals outlined in this strategic plan depends upon successful execution of the tactics identified and the regular monitoring of our progress, as well as tactical decisions during plan implementation on how to further our progress. As such, this strategic plan is a living document, and we anticipate that changes may be necessary to achieve the goals we set forth.

PERS will use its existing strategic and operational planning function to prioritize and allocate resources for each of the strategies identified. Strategies will be implemented through a variety of approaches, including problem solving, project management, and integration into core business practices. Specific performance metrics will be identified for tracking our progress as part of strategy initiation.

Certain strategies depend on additional funding. We developed and submitted corresponding policy option packages with the agency's budget requests for the 2025-27 budget cycle, which will also serve as inputs into the 2027-29 budget cycle.

ORGANIZATIONAL MANAGEMENT AND DEVELOPMENT

Introduction

PERS' strategic priorities include goals related to three organizational management and development focus areas: workforce development, organizational communications, and the PERS Outcome-Based Management System (POBMS).

PERS' success in delivering upon our mission depends on having a highly skilled and diverse workforce supported by leadership that sets clear policies, procedures, and performance expectations. The plan's workforce development goals and strategies recognize this can only be achieved through continued investments in staff development.

Recognizing the importance of recruiting a talented and diverse workforce, we will create relationships with universities, colleges, and community workforce placement programs to support marginalized groups and students with opportunities to gain workforce experience through internships.

Through staff and leadership collaboration, we will strengthen our performance management goals, make investments in staff education to include diversity, equity, and inclusion efforts, coach and implement leadership best practices, and implement our agency succession plan.

Enhancing organizational communications is also a priority for PERS. Access to timely, accurate, and relevant internal information helps ensure that we, as an agency, communicate effectively with our members, employers, constituents, and staff.

This priority was identified by staff in PERS' employee engagement survey. Survey results indicate many staff would like greater transparency and different content regarding information relevant to their jobs; staff also noted the desire for more information on decisions and policies that could affect them.

The third focus area relates to the work of fully integrating POBMS. The agency initiated POBMS in 2012 to improve operations and processes by engaging employees through an outcome-based approach, allowing those closest to the work to drive the improvement. Completing the integration and normalization of POBMS is important to continuing to improve performance outcomes. PERS staff support and benefit from POBMS because it provides a clear line of sight and a transparent approach to connect the agency's goals and objectives to staff's role in meeting them.

Focus Area: Workforce Development

GOAL

Develop and support a dynamic workforce by providing means and opportunities for staff to access tools to reach their full professional potential.

Objective 1

Provide ability for staff to access relevant professional development and training opportunities.

Tactics

1. Inventory all current professional development and training programs and courses.
2. Evaluate access to and availability of these programs.
3. Deploy appropriate and relevant access to staff.
4. Develop communications strategy to generate ongoing visibility to staff within the agency.

Related measure

SP 5: Managing and Developing the Workforce

Objective 2

Provide consistent visibility to internal career opportunities within the agency.

Tactics

1. Inventory current internal opportunity business process.
2. Develop, implement, and maintain an ongoing centralized business process that provides consistent visibility to internal opportunities of both full-time and work-out-of-class positions.
3. Periodically evaluate efficacy of and responsiveness to new business process to determine possible improvements and areas for opportunity on an ongoing basis.

Related measures

OM2: Employee Engagement

SP5: Managing and Developing the Workforce

Objective 3

Provide development opportunities and training tailored to supervisors, managers, and administrators to encourage an environment of continuous leadership growth and improved workforce retention.

Tactics

1. Implement and follow steps for succession plan training in order to facilitate the most relevant, targeted professional development possible for staff members, including those based on leadership competencies.
2. Conduct mandatory monthly leadership training with active discussion, exercises, self-reflection, quizzes, and group dialogue.
3. Monitor engagement survey and leadership 360 reviews to determine efficacy and impact of leadership development strategy.

Related measures

OM2: Employee Engagement

SP5: Managing and Developing the Workforce

Focus Area: Organizational Communication

GOAL

Support ongoing and improved employee engagement by providing consistent internal communications.

Objective 1

Maintain consistent communication around topics and information that are the most relevant and important to staff.

Tactics

1. Identify information that is most likely to be relevant and important to staff.
2. Determine communication strategies that support effective dissemination of various types of information through appropriate channels.
3. Monitor both consistency of efforts, as well as staff response over time, beginning when each methodology is implemented, and track relative participation on a quarterly basis.

Related measures

OM2: Employee Engagement

SP1: Communicating Internally and Externally

SP5: Managing and Developing the Workforce

Focus Area: PERS Outcome-Based Management System (POBMS)

GOAL

Complete POBMS integration throughout the agency.

Objective 1

Fully develop team scorecards to measure performance and drive strategic, tactical, and operational decisions.

Tactics

1. Train staff in measures development and POBMS.
2. Continue regular reviews to ensure scorecard measures reflect business needs.
3. Leverage data analytics platforms to enhance reporting capabilities.

Related measure

SP6: Strategic and Operational Planning

Objective 2

Normalize portfolio and project management organizational methods.

Tactics

1. Put a structure in place to support initiation and implementation of projects and their alignment with the strategic plan.
2. Leverage enterprise portfolio management to prioritize and properly resource agency initiatives and ensure enterprise is focused on priority projects.

Related measure

SP6: Strategic and Operational Planning

MEMBER SERVICES AND COMMUNICATIONS

Introduction

PERS administers public employee benefit trusts to provide retirement benefits and services to members. In fact, all of PERS' strategic priorities ultimately support our ability to provide the services needed by members and to ensure we "pay the right person, the right benefit, at the right time."

As a strategic priority, enhancing member services and communications addresses two focus areas: member relations and quality delivery methods.

PERS' member education and outreach historically has focused primarily on those who are within two years of their effective retirement date. This just-in-time focus does not provide members with a full understanding of the need to financially prepare for retirement over their entire career. PERS recognizes that providing members with useful tools, resources, and education earlier, and throughout their careers, will better support our goal of having engaged and educated constituents.

A key component of this education will be the need for members to supplement their PERS retirement with other means, such as deferred compensation and personal savings. Additionally, efforts will be taken to better integrate communications alignment, such that members understand their PERS benefits (Tier One, Tier Two, Oregon Public Savings Retirement Plan, and the Individual Account Program), as well as benefits offered under the Oregon Savings Growth Plan (OSGP) and the PERS Health Insurance Plan (PHIP).

Engaging and supporting our members in making informed retirement decisions creates a broader role for PERS as a retirement education and planning resource. To be that resource, we must support members by providing the information and easy-to-use tools to understand their retirement benefits.

Our current toolset needs to be more accessible and include a broader array of relevant content: not only account and benefit information, but transaction status tracking. This is what our quality delivery methods goals aim to accomplish.

Focus Area: Member Engagement

GOAL

Engage members throughout their careers so they are better prepared for retirement.

Objective 1

Develop member journeys with relevant accessible resources for different life and career stages.

Tactics

1. Enhance existing journey maps online – linked resources on PERS website.
2. Member surveys – provide post-service surveys to ensure sufficient and accessible resources are being provided and improved, to ensure accessibility.

Related measures

OM1: Clear/Concise Communication

OM7: Member Satisfaction

OM10: Informed Retirement Decisions

SP1: Communicating Internally and Externally

Objective 2

Brand PERS as members' retirement education and planning resource.

Tactics

1. Continue to enhance marketing of services that PERS offers members.
2. Provide annual PERS Retirement Expo.

Related measures

OM1: Clear/Concise Communication

OM7: Member Satisfaction

OM10: Informed Retirement Decisions

SP1: Communicating Internally and Externally

Focus Area: Omni-Channel Service Delivery

GOAL

Improve members' satisfaction with PERS.

Objective 1

Enhance, secure, and modernize account accessibility and capabilities for members to self-serve.

Tactics

1. Modernize and secure Online Member Services, providing more accessibility, member-specific information, and electronic transaction capabilities.
2. Maintain the PERS website to ensure ease of navigation, search capabilities, and Americans with Disabilities Act compliance. Integrate OSGP and PHIP to better inform and educate members with a complete PERS picture.

Related measures

OM1: Clear/Concise Communication

OM7: Member Satisfaction

OM10: Informed Retirement Decisions

SP1: Communicating Internally and Externally

Objective 2

Launch new education tools and resources valuable to the member journey from hire to retire.

Tactics

1. Continue to create resources for new members.
2. Create resources for members when vested.
3. Create resources for members when nearing retirement eligibility.

Related measures

OM1: Clear/Concise Communication

OM7: Member Service Satisfaction

OM10: Informed Retirement Decisions

SP1: Communicating Internally and Externally

DATA CONSISTENCY

Introduction

Data is the cornerstone of PERS' mission to "pay the right person the right benefit at the right time." Good, reliable data can be compromised by many factors: changes in determinations of service credit, contributions, and other key retirement data elements over a member's career; changes in employer reporting and recordkeeping systems as well as retroactive changes to member data by employers; and changes in technology.

Further, PERS is a complex plan, with data terms that confuse members and employers alike. These factors result in data that may be incomplete, inconsistent, or missing, which in turn erodes confidence and trust in PERS by our members, employers, and the public.

To improve data consistency, PERS will take a multipronged approach. First, we will explore and implement a data and analytics program to create a structure that allows the agency to be an insight-driven organization. By doing so, decisions will be heavily influenced by data and analytics. As a result, the directions the agency will take will be based on logic, historical trends, future forecasting, and a thorough data analysis, among others. Additionally, this data and analytics program will provide an architecture that is nimble and accessible.

Second, via the PERS Modernization Program and other corresponding efforts, PERS will look to implement improved technologies that assist with validating inbound data. This approach will result in a more stable and accurate data reporting platform that moves agency processes away from manual data manipulation to technologically automated validations.

Third, PERS will continue to look for and implement processes and efforts to address the legacy data issues. Having access to good, reliable data is important for PERS staff, and our current data management structure presents many challenges that result in data that is difficult to access or inconsistent.

Data management practices that contribute to internal data inconsistencies include different methodologies used to access data, data sources are not mapped, lacking common data definitions and business context descriptions, and the need for an integrated structure to leverage existing data expertise in the agency. The above-mentioned efforts, which will partly be addressed by the modernization program, will have a positive impact on helping assist with the clean-up of lingering legacy data issues.

Additionally, a collection of agency staff is currently collaborating to identify and prioritize legacy data issues. This inventory will help set the stage for staff to actively work with the highest priority legacy data issues currently present.

The fourth effort will be an exploration to how PERS can work towards reducing and, ultimately, preventing the need to modify data after it has been submitted. Currently, there are a magnitude of reasons for why data must be modified after transmitted. Reasons include but are not limited to misreported data, inaccurate data, and gaps in reported data. A great deal of resources, including time and money, are spent in modifying data. By preventing this, resources can be redirected towards other needs, consequently, PERS could provide better services to constituents.

Focus Area: Data Analytics

GOAL

Use data analytics to enhance operational efficiency, process management, reporting, and insight.

Objective 1

Improve employer reporting validations to minimize manual review and corrections to data.

Tactics

1. Identify validation gaps in Employer Data Exchange (EDX).
2. Create new validations in EDX as part of modernization efforts.
3. Improve employer education program.

Related measures

OP1: Managing Client Data and Services
OM9: Timely Benefit Payments
OM8: Effective Employer Partnerships
OM10: Informed Retirement Decisions
OM11: Accurate Benefit Calculations

Objective 2

Use technology, including data validations where appropriate, to reduce manual processes.

Tactics

1. Develop an inventory of manual and inefficient processes.
2. Identify and propose actions that could reduce manual processes or inefficiencies.
3. Provide feedback and input to modernization planning so that technological solutions to these processes can be included.

Related measures

OP1: Managing Client Data and Services
OM9: Timely Benefit Payments
OM10: Informed Retirement Decisions
OM11: Accurate Benefit Calculations

Focus Area: Data Integrity

GOAL

Resolve legacy and incoming data issues.

Objective 1

Identify data issues and prioritize cleanup efforts to improve data quality.

Tactics

1. Through data governance and the establishment of the data steward role, identify and prioritize data issues for resolution.
2. Develop a plan, including resources, to resolve data issues.
3. Provide feedback and input to modernization planning so that technological solutions to these processes can be included.

Related measures

OP1: Managing Client Data and Services
OP2: Collecting Contributions
OP4: Processing Benefit Applications
OP5: Calculating Benefits

Objective 2

Minimize need to change data after receipt from employers.

Tactics

1. Create policies and procedures that eliminate multiple reviews.
2. Create member data locking processes.
3. Communicate with and educate employers and members on data locking impacts.

Related measures

OP1: Managing Client Data and Services
OP2: Collecting Contributions
OP4: Processing Benefit Applications
OP5: Calculating Benefits
OM8: Effective Employer Partnerships
OM10: Informed Retirement Decisions

Focus Area: Data Utilization

GOAL

Use data and analytics to help drive and support agency decisions.

Objective 1

Become an insight-driven organization.

Tactics

1. Reduce the amount of manual data manipulation currently performed to get the desired insights.
2. Enable the right tools and policies, coupled with removing offline tools, to enhance data integrity and quality.
3. Provide feedback and input to modernization planning so that technological solutions to these processes can be included.

Related measures

OP1: Managing Client Data and Services

OM3: Operating Effectiveness

INFORMATION TECHNOLOGY

Introduction

PERS' information technology (IT) system provides the foundational data and information management necessary to “pay the right person the right benefit at the right time.” Our primary IT system is the Oregon Retirement Information Online Network (ORION). The main application in ORION is jClarety, the existing Pension Administration System (PAS), which is scheduled to be replaced by a commercial-off-the-shelf solution as part of the PERS Modernization Program.

Focus Area: Maintain jClarety through Modernization

GOAL

Maintain stability and support for jClarety during the PERS Modernization Program.

Objective 1

Prioritize and resolve technical debt in jClarety.

Tactics

1. Resolve key issues affecting jClarety administration, performance, maintainability, and sustainability to prepare for modernization.
2. As needed, refactor nightly jClarety batch processes to improve maintainability and efficiency and reduce batch durations.
3. As needed, redesign logging, monitoring, and error-handling functionality of jClarety batch processes to stabilize the core application and its supportability.
4. Update underlying technologies with current versions and to mitigate security vulnerabilities.

Objective 2

Implement changes as mandated by the Legislature.

Tactics

1. Request budget needs to implement the mandated changes from the Legislature.
2. Support, execute, and deploy necessary system changes in jClarety by their effective date.
3. Augment staff with contractors when necessary.

Related measures

SP2: Managing Compliance and Risk

SP3: Leveraging Technology

SP4: Managing Organizational Finances and Resources

Focus Area: Information Technology (IT) Workforce Development

GOAL

Improve workforce environment and prepare for and attract the next generation of technical talent.

Objective 1

Transform Information Services Division's (ISD) working environment to encourage collaboration and innovation.

Tactics

1. Deploy innovative and collaborative tools for effective real-time communication to support telecommuting between staff, outside contractors, and other partners.
2. Reduce functional silos within ISD by using virtual collaborative platforms and optimizing the Development Operations team.
3. Improve internal documentation by leveraging collaborative workspaces such as DocWiki, Jira, and SharePoint.
4. Obtain a technical writer resource to help with documentation gaps and updates.

Objective 2

Rollout the ISD Skills Academy Program

Tactics

1. Implement the ISD Skills Academy Program, a framework to facilitate workforce capability improvement and monitoring.
2. Design the ISD Skills Academy Program based on the workforce development strategy for ISD, skills gap assessment, and results from staff questionnaires,
3. Align the ISD Skills Academy Program with the strategies of the PERS Modernization Program.
4. Utilize multimodal resources to deliver training content for the ISD Skills Academy Program.
5. Create training labs for staff to practice and exercise newly learned skills.

Related measures

SP3: Leveraging Technology

SP5: Managing and Developing the Workforce

FINANCIAL MANAGEMENT

Introduction

As the financial world continues to evolve with a focus on greater transparency and ease of use for consumers, so too must PERS develop strategies to keep pace with these changes and meet member expectations.

This level of responsiveness and transparency requires investing in an enhancement to our financial management tools, resources, and knowledge. Since 2003, PERS has been required to provide multiple pension plan options and enhancements, and the increasing demands appear likely to continue.

To meet these and future needs, we need to create a financial management strategy that allows greater flexibility to pivot when legislation or members demand it. To succeed, we need to enhance and integrate our financial management systems as well as invest in professional and organizational development.

Our current financial management systems require intense manual oversight, which exposes us to quality control and duplicative work. As a result, we spend an inordinate amount of time not only verifying staff work but also verifying the data we receive. Enhancing our systems promotes efficiency, increases accuracy, limits manual oversight, and streamlines workflows.

Additionally, we need to invest in our Financial Services Division's professional development. As we invest in technology upgrades, we must ensure our workforce is able to meet the demands of new programs and be educated on the most up-to-date processes. This group will influence and inform constituents about the implementation of our financial strategy and we need to ensure we invest the same amount of attention in their development as we have in the technology meant to assist them.

Focus Area: Technology Upgrades and System Integration

GOAL

Enhance and improve productivity, reduce manual processes, and accurately and quickly respond to legislative and constituent needs.

Objective 1

Increase efficiency, improve communications, and reduce manual work.

Tactics

1. Develop an inventory of manual or inefficient processes.
2. Identify and propose actions that could be taken to reduce manual and inefficient processes.
3. Provide feedback and input to modernization planning so that technological solutions to these processes can be included.

Related measure

OP6a: Manual Checks

Objective 2

Standardize financial data organization and reduce manual reconciliation between systems to improve accuracy and responsiveness to legislative and constituent needs.

Tactics

1. Engage Central Data Management to improve data gathering and reporting.
2. Actively participate with the PERS Modernization Program to identify where modernization work can reduce manual processes and increase efficiency.

Related measure

OP6e: Tax Reporting

Objective 3

Evaluate and implement electronic filing and paperless processes to respond to inquiries effectively and promptly and efficiently process transactions.

Tactic

1. Evaluate opportunities to transition remaining paper processes to electronic and implement these changes where feasible.

Related measures

OP6b: Direct Deposit

SP4d: Timely Payment Processing

Focus Area: Financial Management Resource Development

GOAL

Ensure PERS has both the appropriate staff resource and skill level to perform the financial accounting, reporting, budgeting, analysis, and forecasting required to be compliant and deliver exceptional service to our constituents.

Objective 1

Ensure financial operations has appropriate staffing to provide timely and accurate service to all constituents.

Tactics

1. Update section managers' quarterly performance, accountability, and feedback goals to include evaluation of section staffing.
2. Develop division-wide task and responsibility matrix to identify coverage, backup, and potential gaps.
3. Update staff responsibilities and staffing models to address timeliness and accuracy.

Related measure

SP6: Strategic and Operational Planning

RISK MANAGEMENT

Introduction

Risk is defined as the “effect of uncertainty on objectives.” The consequences associated with a risk can enhance the achievement of objectives (positive consequences) or can limit or diminish the achievement of objectives (negative consequences). Management of risk, therefore, is an essential business activity required to help the agency achieve its core mission.

Enterprise risk management (ERM) is a process applied across the enterprise designed to identify potential events (risks) that may affect the agency and to manage risk to be within the agency’s risk appetite (tolerance), in order to provide reasonable assurance regarding the achievement of the agency’s objectives.

PERS’ Security and Risk Section is tasked with developing and implementing an enterprise risk management program, designed to provide oversight, guidance, and monitoring activities for evaluating agency risk for business and technological activities necessary to achieve agency objectives. The ERM program will focus on the following types of risk:

- Reputational risk
- Operational risk
- Financial risk
- Strategic risk
- Hazard risk
- Compliance risk

It is essential for agency staff to have a common understanding of risks associated with the decisions we make while performing our mission. Establishing an enterprise risk management function will serve to guide management and staff during their decision-making process to ensure reducing agency risk is paramount when choosing one path over another.

Two of the largest risk management areas that must be specifically addressed relate to information security and business continuity. PERS is entrusted with the personal information of its members. The agency must ensure this information is adequately protected by employing safeguards as managed in the information security program.

Additionally, retired members rely on the routine and timely monthly benefit payments. PERS must ensure that its members continue to receive their payments in the event of a business interruption. Through the agency’s continuity management program, PERS can ensure that these payments will continue even in the event of a disaster.

Focus Area: Risk Management

GOAL

Establish an enterprise risk management program within the Security and Risk Section.

Objective 1

Secure legislative support and funding to stand up an enterprise risk management program that meets industry standards.

Tactic

1. Submit the Policy Option Package for enterprise risk management resources for the 2027 legislative session.

Related measure

SP2.6: Conducting enterprise risk management efforts

Objective 2

Establish and implement an enterprise risk management program throughout the agency.

Tactic

1. Work with a contractor to develop and implement an ERM program.

Related measure

SP2.6: Conducting enterprise risk management efforts

Focus Area: Risk Management

GOAL

Enhance the practices and controls of the information security program.

Objective 1

Strengthen the agency's information security program in alignment with enterprise and industry best practices.

Tactics

1. Collaborate more closely with Enterprise Information Services' Cyber Security Services to better align the agency's information security program with the state's cybersecurity requirements.
2. Evaluate and align the agency's cybersecurity controls with those provided by the enterprise to reduce duplication.
3. Monitor staff's continued adherence to the agency's security policies, standards, and procedures.

Related measures

SP2.9: Developing and overseeing information security program

SP3.7: Implementing and maintaining system security

Objective 2

Strengthen member and employer identity and access management practices and controls.

Tactics

1. Implement an industry-standard identity and access management solution and practices for PERS members, employers, and third-party administrators.
2. Implement an industry-standard identity verification solution for members, employers, and third-party administrators as appropriate.

Related measures

SP2.9: Developing and overseeing information security program

SP3.7: Implementing and maintaining system security

OM7: Member Service Satisfaction
OM8: Effective Employer Partnerships

Objective 3

Develop and implement a privacy initiative for members.

Tactics

1. Develop and implement privacy policies, practices, and solutions to protect members' data.
2. Train agency personnel on the privacy practices, policies, and procedures.

Related measures

SP2.9: Developing and overseeing information security program
SP3.7: Implementing and maintaining system security
OM7: Member Service Satisfaction

Focus Area: Risk Management

GOAL

Enhance practices and controls of the continuity management program.

Objective 1

Design and implement resilient systems and disaster recovery procedures to support the agency's mission.

Tactics

1. Establish guardrails and controls to ensure PERS can continue critical business operations using the State of Oregon's managed services and warm site.
2. Ensure backup and recovery systems and warm site are regularly tested to ensure the timely restoration of critical systems.

Related measures

SP2.8: Ensuring continuity of operations
SP3.3: Ensuring system availability and performance
OM9: Timely Benefit Payments

Objective 2

Mature the Continuity Management Program to include additional agency processes.

Tactics

1. Prioritize agency processes in alignment with business requirements.
2. Implement and test the additional business processes to ensure they meet PERS' mission.

Related measures

SP2.8: Ensuring continuity of operations
SP3.3: Ensuring system availability and performance
OM9: Timely Benefit Payments

MODERNIZATION

As demands on PERS' systems grow in response to evolving business needs, legislative changes, demographic shifts, and member expectations, the PERS Modernization Program must pursue a deliberate, proactive, and forward-looking modernization strategy. The PERS Modernization Program is committed to transforming the way we deliver pension administration services by investing in modern technology, optimizing business processes, and preparing our workforce to meet the future with agility and confidence.

Modernization begins with acknowledging that our legacy systems, while foundational to our operations, are increasingly limited due to an inflexible design and aging architecture. Investing in a more modern, configurable system will enable us to enhance responsiveness, reduce technical debt, minimize manual processes, and support evolving service delivery models, including omnichannel services.

Equally important is modernizing how the business of PERS operates. This includes redesigning outdated processes, reducing manual handoffs, minimizing reliance on offline tools, and leveraging data more effectively to inform decision-making and improving service outcomes. By working collaboratively across business units, we will define future-state workflows and ensure that technology implementations support operational goals. This business transformation will be driven by measurable outcomes, such as timely benefit processing, improved accuracy, and increased member satisfaction that will be supported by a culture of innovation and continuous improvement.

This strategy must position PERS to meet the demands of tomorrow while honoring the trust placed on us by our members and employers. By modernizing our systems, investing in our staff, and mitigating risk, we will transform not just our technology but the way we deliver on our mission.

Focus Area: Modernization

GOAL

Create an adaptable system that operates efficiently and effectively, providing timely and accurate services.

Key Goals from Fundamentals Map: 1) Efficient, Effective, and Adaptable Organization 2) Timely and Accurate Service

Objective 1

Replace the legacy Pension Administration System with a modern, configurable system that incorporates cloud-ready technologies to ensure long-term sustainability.

Tactics

1. Develop and submit foundational documents for the PERS Modernization Program and Pension Administration Project.
2. Develop requests for proposals (RFP) (i.e., for the PAS solution and system integrator), post for bids, and award contracts.
 - Conduct market research
 - Gather requirements
 - Identify system gaps
3. Create a modernization plan with workstreams.
 - Workstreams include, but are not limited to:
 - System gap analysis (how to address gaps)
 - Data integrity and cleaning
 - Data architecture and data migration
 - Cloud infrastructure
 - Integrations
 - Security
4. Update modernization roadmap.
5. Develop and complete resource plan.
6. Request additional funding in 2026 legislative session.

Related measures

- OM7: Member Satisfaction
- OM9: Timely Benefit Payments
- OM11: Accurate Benefit Calculations
- SP3 : Providing Information Technology
- SP5: Managing and Developing the Workforce
- SP6: Strategic and Operational Planning

Objective 2

Re-engineer business processes.

Tactics

1. Develop current-state business journey maps with documented improvement initiatives that will improve member and employer satisfaction. Journey maps include, but are not limited to the following pension life cycle events:
 - Enroll in the plan
 - Get divorced
 - Take leave
 - New partner
 - Change jobs
 - Become disabled
 - Begin planning to retire
 - Retire
 - Deceased (pre-retirement)
 - Deceased (post-retirement)
 - Retired and working again

Related measures

- OM7: Member Satisfaction
- SP6: Strategic and Operational Planning

GOAL

To cultivate a well-informed and engaged group of constituents, while empowering our workforce to achieve success.

Key Goals from Fundamentals Map: 1) Engaged and Educated Stakeholders 2) Empowered Workforce

Objective 1

Launch a change management program within the PERS Modernization Program that supports employees, members, and employers in achieving their goals and ensuring success.

Tactics

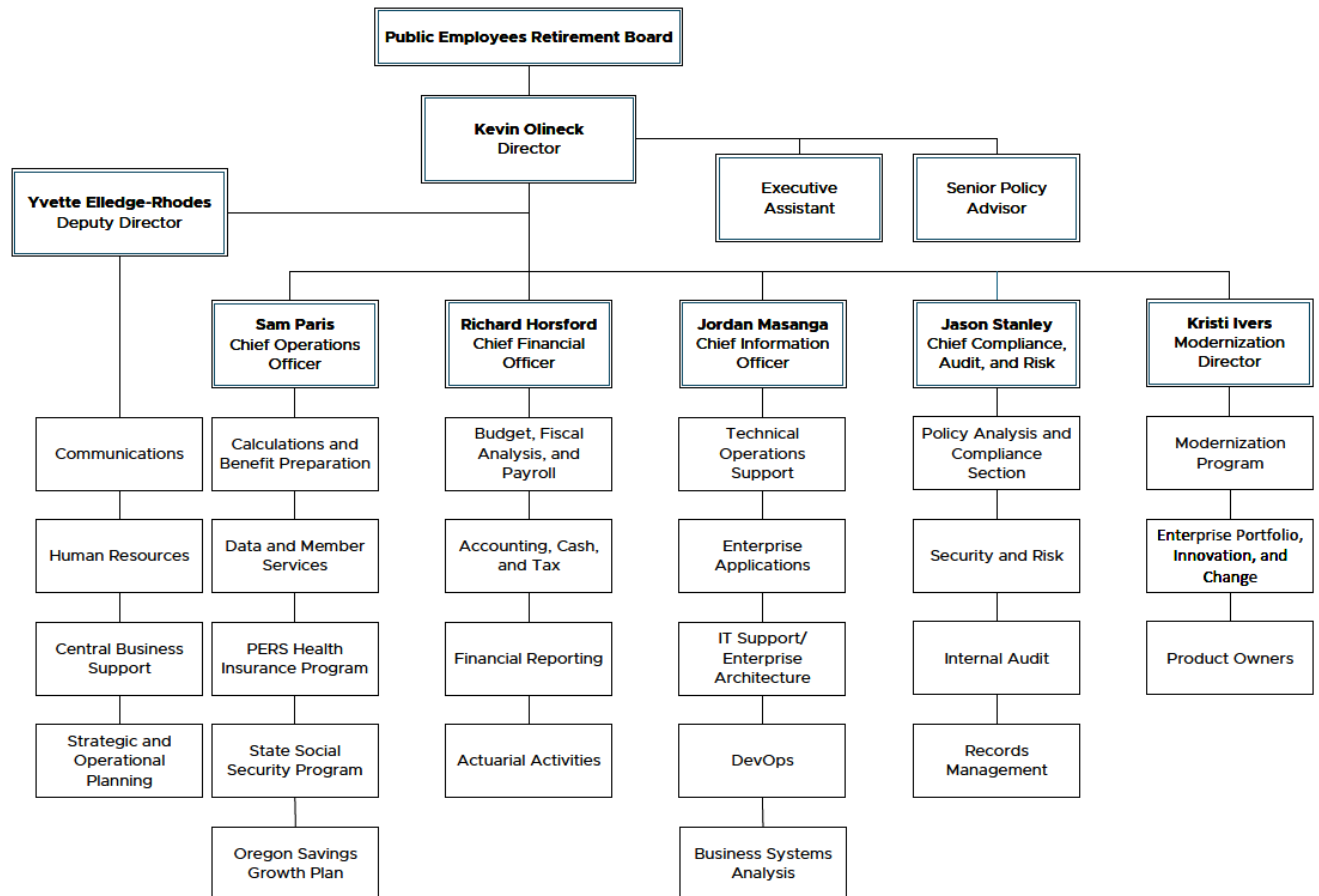
1. Develop RFP for an organizational change management (OCM) vendor, post for bid, and award.
 - Gather Requirements
2. Develop an OCM plan.
3. Develop and complete resource plan.
4. Request funding for 2027-2029 from the General Government Ways and Means Committee.

Related measures

- OM2: Employee Engagement
- OM7: Member Satisfaction
- SP5: Managing and developing the workforce
- SP6: Strategic and operational planning
- SP2: Ensuring continuity of operations

Additional Resources

Organizational Chart



Links to Supporting Documents

PERS IT Strategic Plan:

<https://www.oregon.gov/pers/Documents/PERS-IT-Strategic-Plan.pdf>

PERS Diversity, Equity and Inclusion Plan:

<https://www.oregon.gov/pers/Documents/PERS-DEI-Plan.pdf>

PERS Annual Comprehensive Financial Report (ACFR):

<https://www.oregon.gov/pers/Documents/Financials/ACFR/2024-ACFR.pdf>

PERS Popular Annual Financial Report (PAFR):

https://www.oregon.gov/pers/Documents/Financials/PAFR/PERS_PAFR_24.pdf

PERS by the Numbers: <https://www.oregon.gov/pers/Documents/General-Information/PERS-by-the-Numbers.pdf>

Department of Administrative Services Strategic Planning Resources:
<https://www.oregon.gov/das/strategy/Pages/strategic-planning-resources.aspx>

Department of Administrative Services Strategic Initiatives and Enterprise Accountability:
<https://www.oregon.gov/das/strategy/pages/index.aspx>

