

NHRS FYs 27-29 Strategic Plan

Goals and Strategies	Vital Signs/ Metrics	ETeam Lead(s)	Timing/ Milestones	Budget: People, Systems, Infrastructure
Goal 1: Build on the new pension administration IT platform and implement a longer-term retirement operations strategy and plan.				
1. Advance use of PG’s digital workflow capabilities by completing key targeted projects.	Multiple metrics, e.g. <ul style="list-style-type: none"> Critical PIRs no longer open 	Nancy, Marie, Sonja	<ul style="list-style-type: none"> PIRs to be completed: Termination forms (6/27); Ret 304 (4/26); Service Purchases (12/28); and Salary continuance (12/28) Estimated completion: 12/28 	X
2. Effectively monitor and improve member and employer service levels.	Monitoring dashboards implemented – internal process metrics, member/ employer surveys.	Nancy, Marie, Sonja	Initial: 01/26 Enhanced: 12/27	X
3. Develop and implement a long-term plan for future service enhancements.	Long-term member and employer services enhancement roadmap completed.	Nancy, Marie, Sonja	Plan complete: 12/27	X

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4. Map the Full Pension Lifecycle	<p>Conduct an end-to-end process mapping of the entire pension lifecycle (“soup to nuts”).</p> <p>Identify bottlenecks, redundancies, manual steps, and failure points.</p> <p>Prioritize improvement opportunities based on impact, risk, and effort.</p> <p>Develop a future-state workflow model aligned with standardized data flows and the PGV3 platform.</p>	Nancy, Marie, Sonja	Begin 07/28	

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Goal 2: Improve organizational effectiveness and accountability.				
1. Improve operational oversight through more integrated reporting systems and exception reporting.	Implement an overall IT strategic plan.	Sonja	9/26	X
	Explore technology integration options.	ETeam by dept	Ongoing	X
	Revisit performance measure/ methodology tracking using metrics.	ETeam by dept	Ongoing	X
	Capture and disclose investment management fees.	Investment/ Finance	6/27	X
2. Consider revising the organization structure to better align with NHRS' vital functions (i.e., retirement operations, investments, enterprise administration).	Complete a review of the organization structure and implement appropriate changes.	Jan, Rosamond, Annie	12/26	X
3. Increase Digital Fluency and Data Maturity	Develop a structured digital fluency program (training, tools, templates, peer support). Establish data governance practices, including definitions, stewardship roles, and quality		6/29	

	<p>standards.</p> <p>Build dashboards and reporting tools that support data-driven decision-making.</p> <p>Mature analytics capabilities from descriptive reporting to predictive and prescriptive insights.</p>			
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Goal 3: Build additional Investment Office capabilities to reduce costs and reliance on external resources while improving performance.				
1. Successfully build the Investment Office staff through experienced hires.	Hire the right talent as appropriate to the departments (e.g. legal, technology).	Raynald	IT: 12/26 Legal: 12/26 Finance: 12/26	X
	Trim cost where prudent (external costs).	Raynald	12/27	None
2. Build an internal middle- and back-office capability, including supporting infrastructure.	Investment team is self-sufficient in: <ul style="list-style-type: none"> • Total plan exposure • Controls 	Raynald	<ul style="list-style-type: none"> • Exposure: 06/27 • Controls: 12/27 	X

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Goal 4: Build organizational resilience.				
1. Implement a formal cross training program aligned with succession planning.	Documented processes. Identified positions for cross training intradepartmental. Identified positions for cross interdepartmental.	Rosamond	12/27	X
2. Modernize the Onboarding and Offboarding Process	Eliminate paper and static PDF forms; replace with digital, database-integrated forms. Integrate onboarding/offboarding processes with HR, payroll, security, and identity systems. Establish metrics for processing time, data accuracy, and stakeholder satisfaction	Rosamond, Sonja	6/29	
3. Improve Employee Communications Using Modern Tools	Deploy a modern intranet as the central hub for employee communications. Create standardized templates	Ashley, Rosamond and Sonja	Begin 7/27 and continue through 6/29	

	<p>and content guidelines for consistent messaging.</p> <p>Implement push notification capabilities for urgent or high value communications.</p> <p>Develop a communications governance model (owners, cadence, quality standards).</p> <p>Gather analytics and employee feedback to continuously improve communication effectiveness.</p>			
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