

# PLAN SUSTAINABILITY

1

## GOAL

Set an asset allocation that promotes the long-term sustainability of the System and meets the organization's objectives.

### Objective

Facilitate asset study and adopt any necessary changes.

### Measure

Asset allocation is anticipated to meet or exceed the Board-adopted assumed rate of return on investments over the long term.

Target 

Complete by June 30, 2024

# RISK MANAGEMENT

1

## GOAL

Ensure the business continuity of MOSERS' vital services.

### Objective

Perform a post-Phoenix full back-up/replication test to validate the timely recovery of the critical systems.

### Measure

Ensure recovery time is within acceptable ranges.

Target 

Complete by June 30, 2025

2

## GOAL

Ensure that MOSERS continues to comply with federal IRS code provisions for qualified plans.

### Objective

Identify the necessary steps and submit documentation required by the IRS for MOSERS to remain a qualified plan for tax purposes.

### Measure

Completed submission by MOSERS to the IRS.

Target 

Necessary documents on file with IRS by June 30, 2025

3

## GOAL

Reduce the risk of gaps in knowledge, skills, and abilities due to vacancies.

### Objective

Cross-train for critical business functions.

### Measure

Manager/supervisors provide report to applicable deputy director on section cross training needs for critical operation coverage.

Target 

- 50% complete by June 30, 2024
- 100% complete by June 30, 2025



# STRATEGIC PLAN

Fiscal Years 2023-2025



## MEMBER & EMPLOYER RELATIONS

### GOAL

1

Better manage the distribution of and response time for employer contacts.

#### Objective

Implement a contact center management system in the Employers Services section that automatically routes employer calls, emails, and other communications to available staff, creates workflows, and provides contact center data to the section manager.

#### Measure

Improved response time and oversight.

#### Target

Complete by December 31, 2024

### GOAL

2

Increase knowledge of MOSERS policies and procedures among employers.

#### Objective

Conduct employer training so that employer representatives can successfully use the pension administration system and gain a better understanding of important retirement related policies/procedures. After go-live, support employer representatives with scheduled training refresher opportunities.

#### Measure

- Training content finalized
- Communications plan finalized
- Training schedule finalized

#### Target

Finalize preparations by March 1, 2024

### GOAL

3

Partner with the Department of Corrections (DOC) to increase member outreach to DOC team members.

#### Objective

Expand benefit education and counseling options to provide tailored education and individual, onsite counseling sessions at DOC institutions.

#### Measure

Project completion percentage

#### Target

Launch pilot of new onsite counseling services by April 1, 2024

## WORKFORCE ENGAGEMENT

### GOAL

1

Develop a program for continuous leadership development to ensure appropriate skill sets.

#### Objective

Implement a training plan for new managers and supervisors to include formal training in supervision concepts as well as MOSERS-specific supervisory tasks.

#### Measure

Once implemented, all new managers and supervisors earn a certificate of completion within one year of assuming the leadership role.

#### Target

Develop program by June 30, 2023  
Implement program by June 30, 2024

#### Objective

Establish annual training program for all managers and supervisors.

#### Measure

Once implemented, all managers and supervisors will complete annual training.

#### Target

- Develop program by June 30, 2023
- Implement program by June 30, 2024