

CalPERS Summary of Valuation Results User Manual

Version 1 – Release Date November 2022

Purpose of the Summary of Valuation Results Tool

The purpose of the Summary of Valuation Results tool is to allow stakeholders to see how CalPERS pension plans maintained by different public agencies compare to one another.

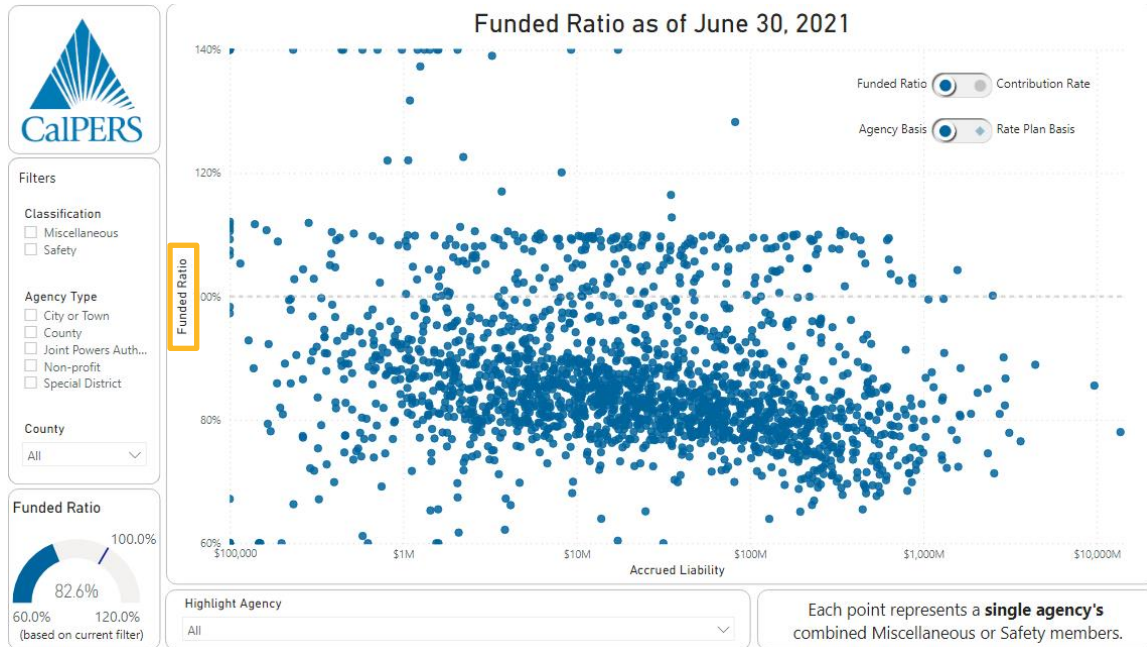
The tool allows you to:

- Filter the data by classification (Miscellaneous or Safety), agency type, and or county.
- Highlight one or more agencies.
- Hover over any data point to see more detail, such as the Unfunded Accrued Liability (UAL).
- Toggle between viewing a scatterplot of funded ratios and contribution rates, or agencies and rate plans.

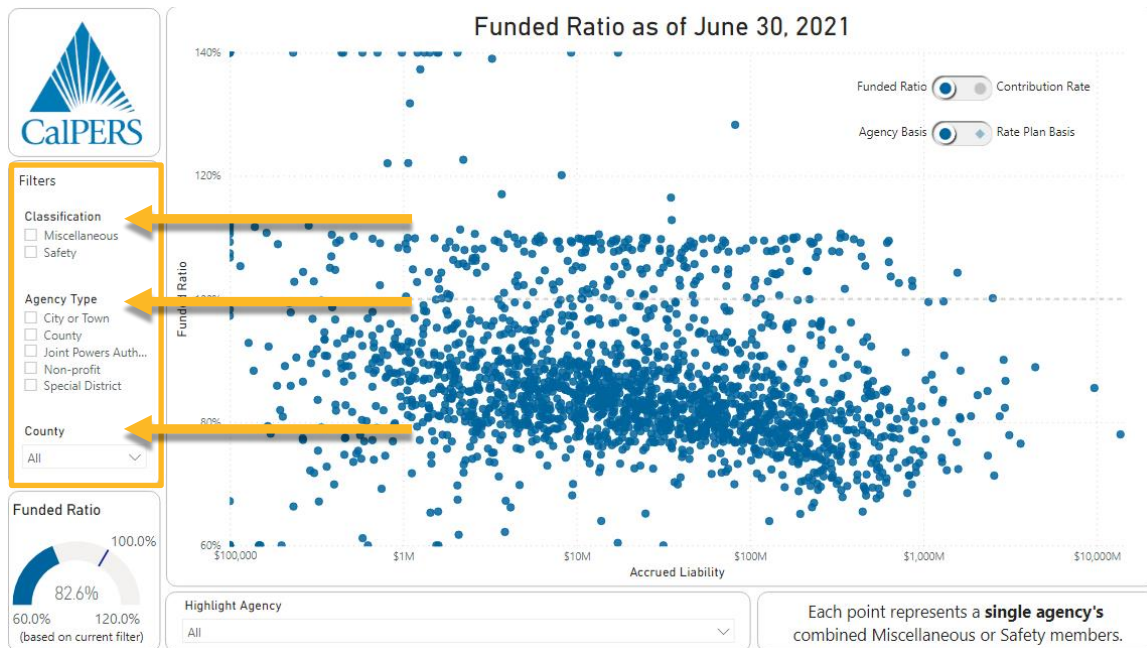
For a better user experience, view the tool on a desktop or laptop rather than a mobile device.

Viewing Funded Ratios

When the page loads, each data point shown represents a **single agency's** combined Miscellaneous or Safety plans. For an agency with both Miscellaneous and Safety plans, two data points appear.

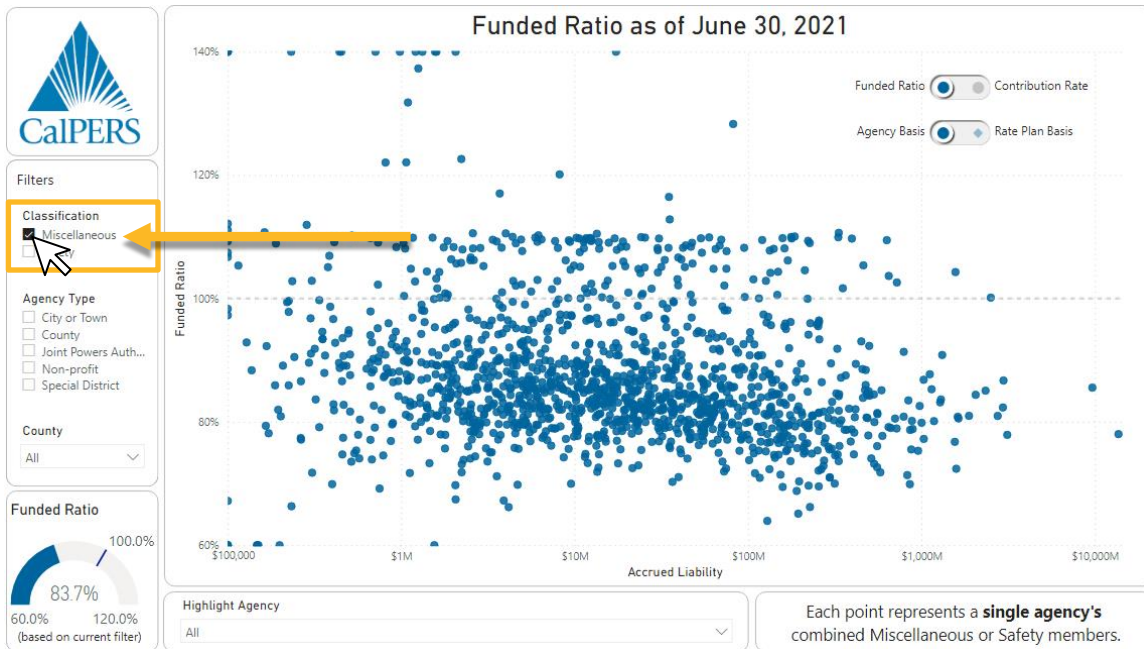


Use **Filters** to focus on the peer group of interest based on **Classification**, **Agency Type**, and **County**.

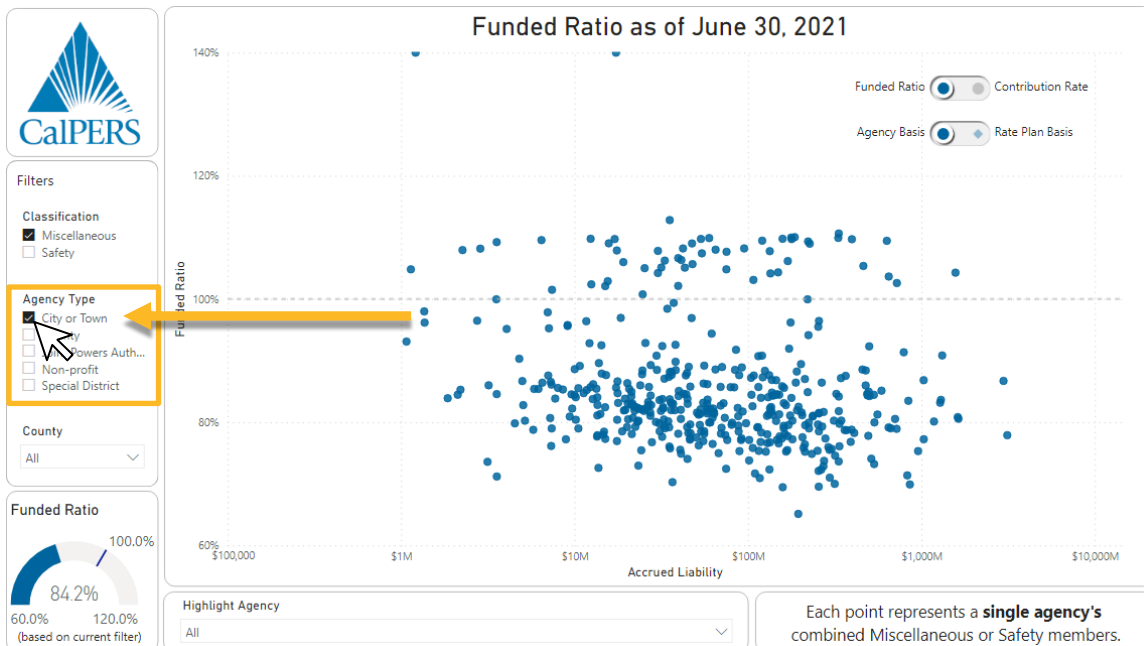


Viewing Funded Ratios (continued)

For example, to view only Miscellaneous plans for cities and towns in Los Angeles County, begin by checking the Miscellaneous filter under **Classification**.



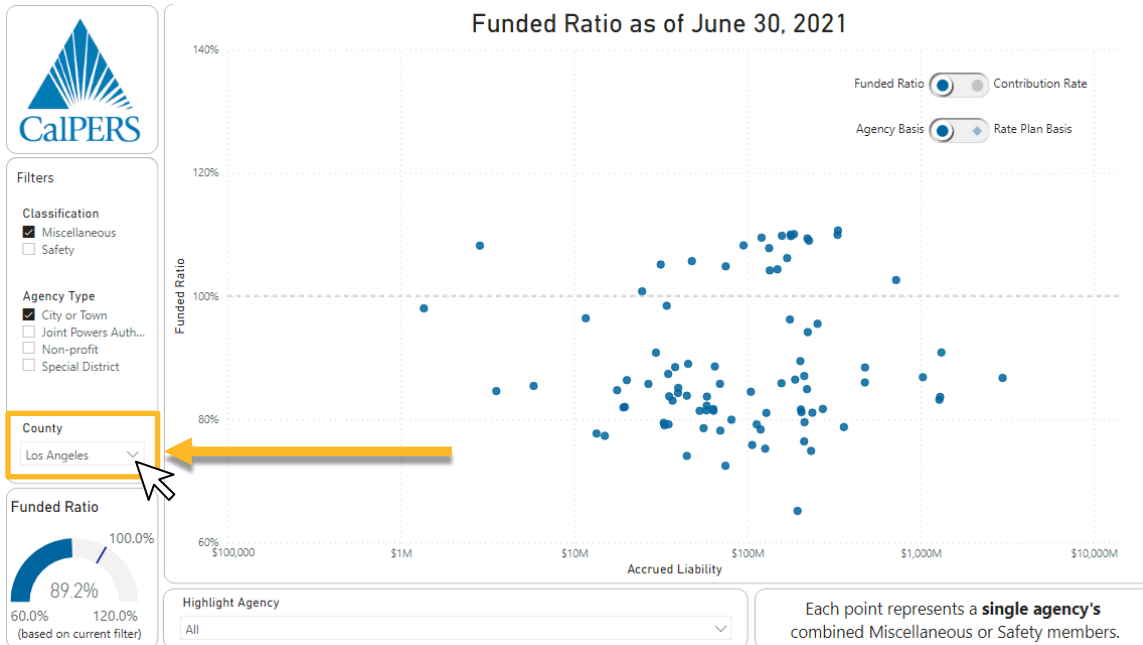
Check the City and Town filter under **Agency Type**.



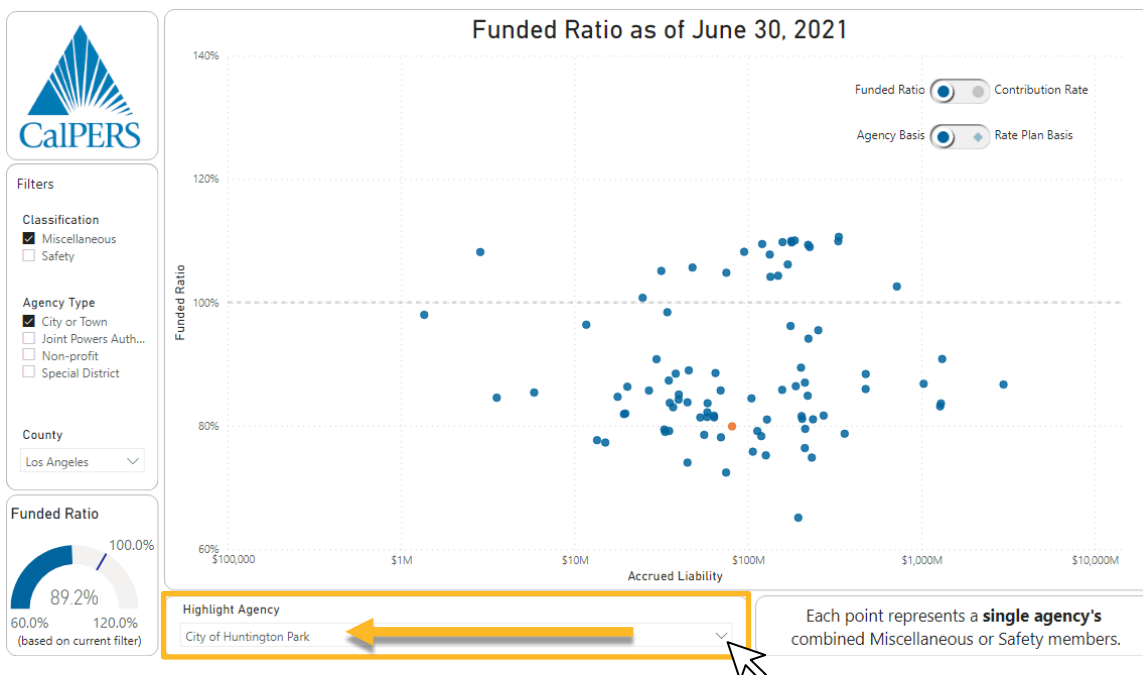
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Viewing Funded Ratios (continued)

Open the **County** drop-down list, check the Los Angeles filter and close the drop-down list.

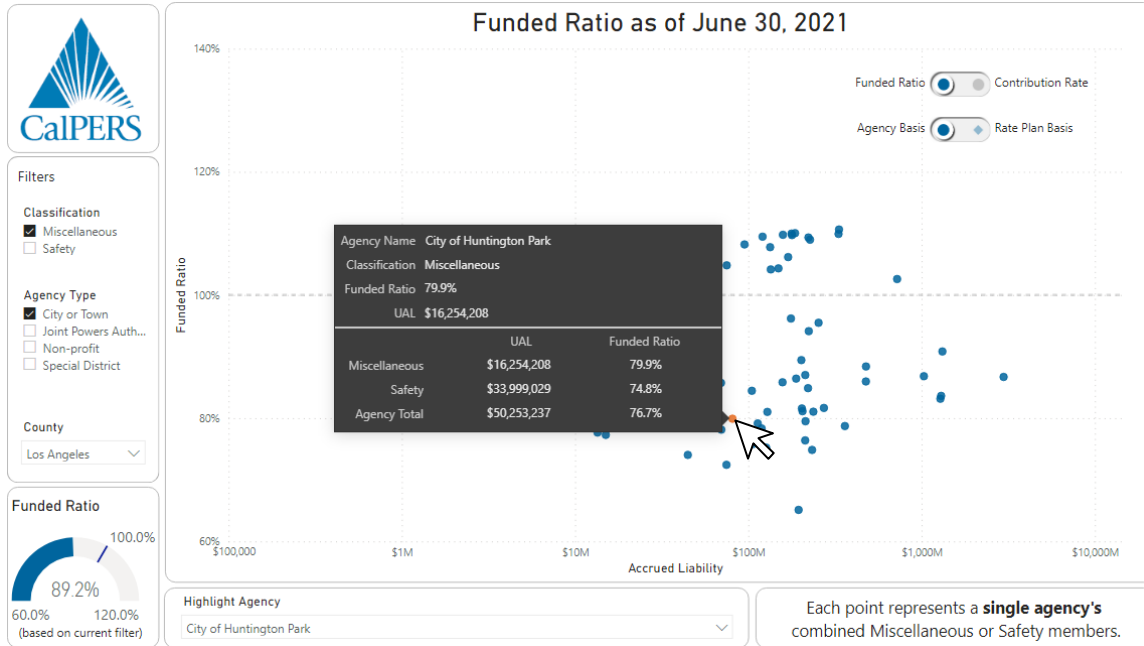


To highlight specific agencies, open the **Highlight Agency** drop-down list, check one or more agencies and close the drop-down list. The highlighted data points will appear in orange.

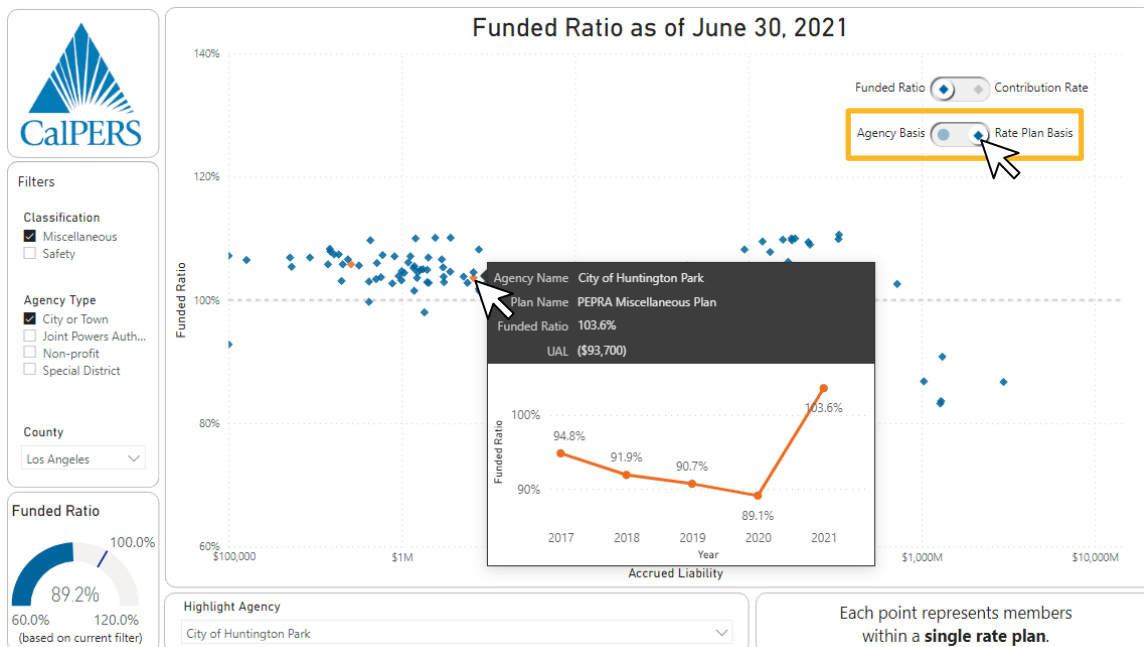


Viewing Funded Ratios (continued)

Hover the mouse over any data point for more information.



To view results on a “rate plan basis” where each data point represents a **single rate plan**, check the **Rate Plan Basis** toggle and hover the mouse over a data point. Multiple data points will show for employers that have more than one Miscellaneous plan or Safety plan.



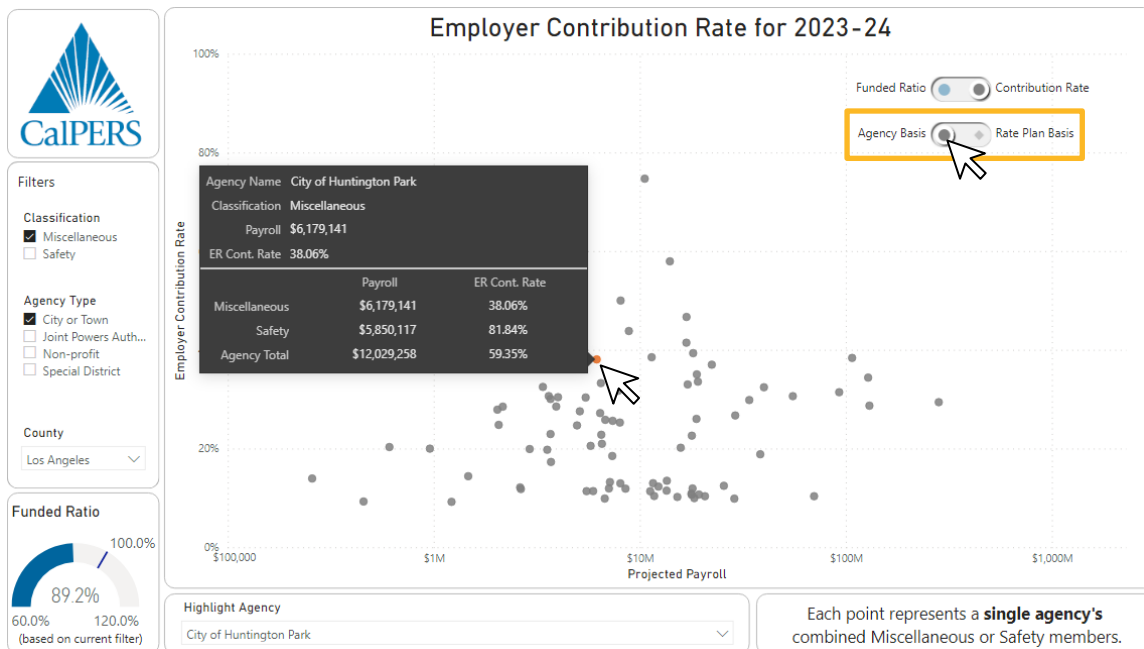
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Viewing Employer Contribution Rates

To view employer contribution rates, check the **Contribution Rate** toggle and hover the mouse over a data point.



Use the **Agency Basis** and **Rate Plan Basis** toggle to view employer contribution rates separated by rate plan or combined by employer.



Clearing Filters

To clear filters, uncheck the checked boxes, or use the eraser above each filter option.

