Washington State
Department of Retirement Systems

Strategic Plan

2026-2031

DRS
WASHINGTON STATE
Department of
Retirement Systems

April 2026

Message From the Director

As the fourth most complex pension system in the nation, Department of Retirement Systems (DRS) serves nearly one million current and former public workers and partners with nearly 1,400 employers, delivering services that our customers rely on every day.

This year, as we celebrate our 50th anniversary, we honor the care and commitment of DRS team members and leaders who came before us. Building on their successes, it is my privilege to share our 2026-2031 Strategic Plan and begin the next chapter of our journey.

This Strategic Plan serves as our roadmap, shaped by the voices and candid insights of our team members, customers and partners across Washington. It reflects our shared values, prioritizes the delivery of exceptional core services and challenges us to envision future innovations. It also provides clear goals, measurable outcomes and a focused set of initiatives that will guide our work and help us stay aligned as we navigate change and pursue new opportunities.

Whether you are a customer relying on our services, a legislator shaping policy, an employer or partner working with us, or a team member delivering those services every day, your role is essential to our mission. We succeed because of your partnership and belief in the value of public service.

Thank you for your engagement, your expertise and your trust. Together, we will continue to build a future-ready organization that delivers with integrity, compassion and excellence for everyone who depends on us.

Sincerely,

Kathryn Leathers, Executive Director

Land Acknowledgment: DRS acknowledges and honors the land we are on today as the ancestorial and traditional territory of the Coast Salish people, including the Nisqually, Squaxin Island and Puyallup Tribal Nations, under the Treaty of Medicine Creek, signed on December 26, 1854. We respect their tribal sovereignty and express deep gratitude for their stewardship of this land.

Our Vision

Every customer enjoys financial security and success.

Our Mission

We empower public workers to retire with confidence by providing timely information, trusted expertise, innovative tools and payment of benefits they've earned.

Our Values

Integrity - We act with integrity in all we do—being honest, ethical and transparent while earning trust through respect, accountability and reliable service.

Customer focus - We are driven by a passion to serve. We provide an excellent customer experience for all through a deep commitment to understanding and meeting the needs of those we support.

Community - We support one another's growth and success. We cultivate an inclusive environment where every team member feels they belong, does meaningful work and is trusted to use their strengths to help us succeed together.

Collaboration - We foster strong relationships and partnerships built on trust, open communication and shared purpose. Together we achieve better outcomes for those we serve.

Adaptability - We embrace a growth mindset, approaching change and challenges with resilience, curiosity and innovation.

Our Goals

1. Deliver an Exceptional Customer Experience
2. Empower Our Team to Serve with Excellence
3. Strengthen our Connected Retirement Ecosystem
4. Advance Operational Excellence

Our Core Services

Washington State Department of Retirement Systems exists to deliver quality retirement services to public employees, retirees and their beneficiaries. Even as we work toward big improvements, our success comes down to doing our core services well every day.

These services are the foundation upon which our strategic progress is built. While we pursue innovation, we must remain grounded in what we do best. This balance helps us grow responsibly and stay true to our role.

What Our Core Services Include

DRS provides core services that keep Washington's public retirement systems reliable. These services include:

- **Plan stewardship.** We administer retirement plans in alignment with statute, rules and fiduciary duties.
- **Accurate benefit administration.** We calculate, process and issue retirement benefits with precision and consistency.
- **Responsive customer service.** We provide clear, timely support to customers and employers across multiple channels.
- **Employer reporting and support.** We ensure accurate, compliant reporting and offer guidance to our employer partners.
- **Member education and retirement readiness.** We help members understand their benefits and plan confidently for retirement.

These services are not optional or aspirational; they are essential public commitments.

Core Service Metrics

To showcase our commitment to service, this plan introduces our core service metrics. These metrics highlight how well we deliver for our customers and how we support our employer partners. Together, they help us track how we're doing, share our progress and stay accountable to the people we serve.

Our core service metrics include, but will not be limited to:

- A customer's average call wait time of less than two minutes.
- A customer's average email response time of less than two days.
- 90% of benefit estimates will be accurate within 3% +/- of the first benefit calculation with the same customer choices such as retirement date and survivorship options.
- 90% of recent retirees are satisfied with their customer service at retirement.
- 90% of defined benefit withdrawals are processed within 5 business days of receiving a complete withdrawal request.
- The median number of days to process the initiation of survivor benefits is less than 10 days.
- At least 80% of employers score us at least an 8 on a scale of 1-10 for employer support services.

Our Goals

Our goals set the direction for where DRS is headed over the next six years. They reflect what matters most to our customers, team members and partners—and guide the major efforts we'll take on to improve retirement services across Washington. Each goal focuses on a core priority.

Our Strategic Initiatives & Key Results

Our strategic initiatives are the major efforts we will take on in the next six years to move us toward our long term goals. The next section groups these initiatives by goal to show how they fit into our overall direction. These are bigger efforts, not day to day tasks, that help improve, modernize and strengthen how we serve. Each initiative has a clear purpose and a clear finish line, so we know when we've made real progress.

Each goal includes key results that show what success looks like and help us track our progress. These measures connect to the goals, not to an individual initiative, so we stay focused on the outcomes that matter most.

Goal 1:

Deliver an exceptional customer experience. Ensure all customers receive clear, timely, and accessible services that support retirement readiness.

Strategic Initiatives

To achieve this goal, we will:

- Evaluate and develop a strategy for a modern customer portal to improve their digital experience.
- Launch and strengthen Neospin—the technology that powers retirement services—to adopt a modern tool, improve work processes and communicate more clearly and timely with customers.
- Find and fix accessibility gaps across our website, documents and outreach resources to make information clearer and easier for customers to use.
- Update our customer portal to replace aging technology, improve process transparency, retirement tools and their overall digital experience.

If time and resources permit, we will also:

- Add more digital forms and self-service tools to make things easier for customers, reduce work and lower errors.
- Create retirement planning and financial security outreach that fits each life stage to better prepare customers for the future.
- Pursue Deferred Compensation Program (DCP) auto-enrollment for school districts, following the success in state agencies and higher education.

Key Results

To measure our progress toward our goal, we will assess the following annually:

- Increase our overall customer satisfaction from our baseline of 4.4 out of 5 to 4.6 out of 5 by 2031.
- Balance the mix of people who take our customer surveys to reflect our full customer base. Our baseline survey response was 56% retirees and 44% active/inactive members. Our goal based on customer demographics is 25% retirees and 75% active/inactive members by 2031.
- Improve the total service score as measured by CEM from our baseline of 79% by 2031.

Data will be gathered through an annual customer survey and the annual CEM survey.

Goal 2:

Empower our team to serve with excellence. Foster a diverse and engaged team where everyone feels valued, builds their skills and is ready to deliver excellent service.

Strategic Initiatives

To achieve this goal, we will:

- Improve cross-team collaboration to strengthen connection and teamwork.
- Reinforce behaviors that support belonging, access, inclusion and respect.
- Train, coach and mentor on modern technology and tools so everyone is ready for Neospin.
- Support team member growth by providing regular opportunities to build skills and grow professionally.
- Strengthen core leadership competencies and behaviors by fully implementing the leadership development initiative for all agency leaders.
- Review our hiring practices to attract more diverse applicants.

Key Results

To measure our progress toward this goal, we will assess the following annually:

- Increase the positive response to the manager effectiveness dimension from our baseline of 86% to 89% by 2031.
- Increase the positive response to the engagement dimension from our baseline of 83% to 86% by 2031.
- Increase the positive response to the diversity dimension from our baseline of 81% to 84% by 2031.
- Increase the positive response to the belonging dimension from our baseline of 78% to 81% by 2031.

Data will be gathered through the state's annual employee engagement survey.

Goal 3:

Strengthen our connected retirement ecosystem. Work more closely with employers, policymakers and peer agencies to deliver coordinated, customer-centered retirement solutions.

Strategic Initiatives

To achieve this goal, we will:

- Define feasibility and a strategy for a modern employer portal to improve their digital experience.
- Strengthen relationships with unions and targeted employers to identify gaps and barriers to providing retirement education to customers.
- Launch an employer portal that supports modern reporting processes, ensures accurate and timely reporting and improves their digital experience.

If time and resources permit, we will also:

- Collaborate with the Health Care Authority (HCA) to create a plan to give customers clear, combined guidance on retirement and post-employment healthcare.
- Review options for adding financial planning advice or guidance services at DRS.

Key Results

To measure our progress toward this goal, we will assess the following annually:

- Increase our overall employer satisfaction from our baseline of 83% positive response to 86% response by 2031.
- Increase positive response to the helpfulness of employer training and resources from our baseline of 78% to 84% by 2031.
- Increase positive response to the helpfulness of member training and resources from our baseline of 79% to 84% by 2031.

Data will be gathered through an annual employer survey.

Goal 4:

Advance operational excellence. Improve efficiency, transparency and long-term stability by using standard processes, strong oversight and better technology.

Strategic Initiatives

To achieve this goal, we will:

- Standardize retirement processes and document them in a plain language, searchable knowledge hub to improve team efficiency.
- Transform our internal financial processes and tools to align to OneWashington.
- Replace SecureAccess Washington (SAW) with the new wa.gov system to give employers a simpler, more secure and consistent login experience.
- Put technology in place to strengthen our cybersecurity with a zero-trust approach.
- Set up a modern IT Managed Services model and train team members to support it.
- Mature continuity of operations plans and capabilities so we can recover quickly from an adverse event.

If time and resources permit, we will also:

- Mature budget and performance management systems to guide planning and prioritization.
- Plan for and conduct risk-based audits of high impact DRS operations to find more ways to advance this goal.
- Look for ways to improve how we manage information and reduce risk by applying best-practice retention rules and sensitivity labels across agency records.
- Implement M365 Copilot to enhance productivity.

Key Results

To measure our progress toward this goal, we will assess the following annually:

- All retirement related processes are documented in the knowledge hub by 2031.
- All impacted team members report that they have the skills and abilities to perform within the IT Managed Services model by 2029.

Data will be collected at least annually by the strategic initiative owner.

Connecting DRS' Strategy to Measurable Progress

To keep this strategic plan actionable and grounded in real results, DRS will use a clear, consistent approach to measuring progress. This approach connects directly to the work described earlier in the plan—our core services, our strategic initiatives and the goals that guide them. By tracking performance across these areas, we ensure we stay focused on what matters most.

Performance Monitoring Framework

We will evaluate progress through three connected lenses that reflect the structure of this plan:

Core Service Metrics. These metrics reflect our commitment to operational excellence and service consistency. They will spotlight performance in areas such as benefit processing, employer support and customer experience. Metrics will be tracked quarterly and reviewed for trends, risks and opportunities.

Key Results for Goals. As described above, each goal is paired with outcome-focused key results. These key results give us clear ways to measure progress and help us stay focused on the outcomes we want to reach over the next six years. Key results will be monitored once per year to ensure alignment with our long-term direction.

Progress of Strategic Initiatives. We will report on the status of active strategic initiatives every quarter, including a simple progress indicator and a description of the work performed since the last quarter.

Reporting and Review Cadence

Agency Quarterly Strategy Reviews. Division and agency leadership will review core service metrics and initiative progress to identify where we need to adjust or speed up the work.

Annual Strategic Plan Refresh. Each year, we will review our goals, initiatives and measures to ensure they remain current. This review will include feedback from customers, employers and other stakeholders, an analysis of our external factors and a check for alignment with statewide priorities.

Transparent Communication. Progress will be shared with team members each quarter through summary reports. A summary report will be prepared annually for the DRS Advisory Board and will be available to other stakeholders upon request. This ensures accountability and builds trust in our strategic direction.

Governance and Ownership

Each strategic initiative has a designated owner responsible for the successful implementation of the initiative. These owners will track progress, coordinate updates, surface risks and issues and remove barriers.

The Budget and Performance Management Director will facilitate data collection, analysis and reporting, ensuring consistency and clarity across divisions.

Continuous Improvement

Monitoring is not just about tracking, it's about learning. We will use what we learn from our measures to improve our strategies, strengthen our services and support a stronger retirement ecosystem. This adaptive approach ensures our plan remains responsive, relevant, and results-driven.

DRS Strategic Planning Process Overview

DRS used a structured, three-stage approach to build this strategic plan. Our goal was to make sure the plan reflects real needs, real data and real voices—from inside the agency and from the customers and partners we serve. The process focused on shared understanding, thoughtful decision-making and clear communication so the final plan is both practical and strategic.

Stage 1: Gather Data & Insights

Establish a shared understanding of current conditions and future considerations.

In this first stage, we collected information from across the agency, our customers and our external partners. Information was gathered from over 2,500 people through surveys, customer focus groups and stakeholder interviews. We looked at data, trends and feedback to understand our opportunities, challenges and risks. We also reviewed ongoing work so nothing important was missed. This gave us a solid, shared foundation to build on.

Stage 2: Develop the Plan

Define strategic direction, goals and priorities.

Using what we learned in Stage 1, leadership worked together to shape the core elements of the plan. We refreshed our Vision, Mission and Values. We identified themes to define our long-term goals and the strategic initiatives that support them. This stage was about turning insights into clear priorities.

Stage 3: Finalize the Plan

Confirm alignment, communicate the strategy and prepare for execution.

In the final stage, we reviewed the draft plan to make sure it was clear, aligned and ready for implementation. The Leadership Team completed risk assessments on the initiatives and refined the plan based on what we learned. Team members and key stakeholders also reviewed the plan and shared feedback to ensure it reflects both organizational needs and external expectations. After these refinements, the plan was finalized and prepared for agency-wide communication.

Ongoing Refresh

The strategic plan is meant to evolve. We will review and update it regularly to keep it relevant, responsive to change and aligned with the needs of those we serve.

Customer Improvement Plan

While developing our strategic plan we also built our Customer Improvement Plan, as outlined in Executive Order 25 06. By bringing these two plans together, we kept our focus on understanding customer needs and making our services clearer, easier to use and more responsive. This helped make sure that the strategic plan reflects our commitments to improving customer experience, strengthening service delivery and advancing equity in how we deliver retirement services.

View our full Customer Experience Improvement Plan.