PENSION BENEFIT GUARANTY CORPORATION

FY 2027 ANNUAL IT PERFORMANCE PLAN

Protecting America's Pensions

PBGC
Pension Benefit Guaranty Corporation

President Trump's Management Agenda (PMA) and PBGC's Strategic Priorities

Execute the Mandate

The FY 2027 Annual IT Performance Plan (Plan) executes on our FY 2026 – FY 2030 IT Strategic Plan and aligns with the priorities of the Trump Administration and Pension Benefit Guaranty Corporation (PBGC or the Corporation) Director Janet Dhillon. PBGC supports the President's overarching mandate to "Make America Great Again" by leveraging technology to deliver faster, more secure services. From an Information technology (IT) perspective, PBGC's highest priorities are to invest in and embrace the latest IT, including super intelligence (SI), to leverage IT, including the responsible use of SI, to improve the speed and quality of our work product and services, and to eliminate bureaucratic barriers that hinder our ability to build a government fit for the 21st century. The PMA articulates key management reform objectives as priority goals, established by the President's Executive Orders and directives, while also meeting requirements set forth in statute. Three overarching PMA Priorities are woven into strategic goal tables below:

- Shrink the government by eliminating positions in non-essential, non-statutory functions, removing poor performers, and terminating unnecessary leases;
- Ensure accountability to American taxpayers by implementing employee performance and accountability standards operating with transparency and accountability, preventing payments to fraudsters and eliminating waste, ensuring transparency and access to reliable information, and ensuring contractors are held to high standards; and
- Deliver results, buy American, purchase as one entity (smarter, faster, cheaper), develop innovative processes through super intelligence, and defend against and persistently combating cyber enemies.

Advance the PMA

PBGC Priorities advance the PMA through a performance culture that instills organizational discipline and tirelessly delivers to the American people. The Corporation works to eliminate waste, ensure accountability, rebuild American industry, and deliver results. As such, PBGC's priorities include:

1. Alignment to the Administration's priorities by delivering high quality, transparent services to Americans
2. Preventing potential fraud, waste, and abuse
3. Strengthening customer experience for participants, retirees, and premium filers
4. Strengthening PBGC's operational support infrastructure

Commit and Serve

Each PBGC employee plays an important role in fulfilling the Corporation's mission of protecting America's pensions. Employee and organizational performance plans ensure a strong accountable workforce that produces results-oriented outcomes. This Annual Performance Plan focuses on the FY 2027 budget year and is informed by progress made against the 2022-2026 PBGC IT Strategic Plan and performance measures developed to ensure compliance with the PMA, Executive Orders and other mandates intended to ensure effective use of Information Technology to achieve mission outcomes. The performance data that follows outline key accomplishments to be achieved over the plan period and includes PBGC's highest priority performance goals, measures, and targets.

PBGC IT Strategic Goals – Alignment with Corporate Goals and Administration Priorities

Table 1: *PBGC IT Strategic Goals*

IT Goal #	Focus	IT Goals & Supporting Effort	Objectives	Preserve plans and protect the pensions of covered workers and retirees	Pay pension benefits on time and accurately	Maintain high standards of stewardship and accountability	Alignment with Administration
1	Strategic	Improve the efficiency and effectiveness of PBGC business processes, via Information Technology	Mission Support				Complying with Executive Orders. Memorandums and Other Mandates
	Technology	Modernize and innovate PBGC's IT solutions leveraging, Super Intelligence (SI) to transform business processes, to improve delivery time, enhance security, improve fraud detection and manage costs.	Support Mission Systems in a Secure and Cost-effective Manner	✓	✓	✓	Accelerating Federal Use of AI through Innovation, Governance, and Public Trust (M-25-21) Maintain effective compliance with the Federal Information Security Modernization Act (FISMA), and respond to OMB M-22 09 by implementing Zero trust Architecture and maintaining the use of multi-factor authentication, and M-25-30 – Ensuring Accountability: How We Oversee, Audit, and Improve
	Process	Secure PBGC's IT to ensure confidentiality, integrity, and availability of systems and data	Protect PBGC, Covered Workers and Retirees Data	✓	✓	✓	
	Technology	Optimize the use of technology to improve data access, data management, data sharing, and data usage through technology	Get the Right Information to the Right People at the Right Time	✓	✓	✓	
	Process	Mature IT Governance to foster business agility, and maintain a robust control environment that will support positive FISMA and Financial Audit outcomes	Deliver IT Products and Services on Time and within Budget		✓	✓	
2	Strategic	Deliver secure, highly available and accessible IT products and services to all PBGC stakeholders in a fiscally responsible manner using best practices.	High Standards of Stewardship and Accountability				

IT Goal #	Focus	IT Goals & Supporting Effort	Objectives	Preserve plans and protect the pensions of covered workers and retirees	Pay pension benefits on time and accurately	Maintain high standards of stewardship and accountability	Alignment with Administration
	Technology	Improve internal and external collaboration using information technology	Make it easier for PBGC staff to get things done				Implementing the President's "Department of Government Efficiency" Cost Efficiency Initiative, M-23-22 - Delivering a Digital-First Public Experience, and 21st Century Integrated Digital Experience Act (IDEA)
	Technology	Provide mobility options to support the changing needs of PBGC's customers	Secure & Reliable Access to PBGC Systems Anytime, anywhere				
	Process	Improve IT service delivery to add business value, achieve efficiency, and increase customer satisfaction	Improve Internal Operations				
	People	Build, equip, and maintain a highly capable IT workforce with the competencies and tools to support future IT initiatives	Right People properly Motivated in the Right Place at the Right Time				

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Key Performance Indicators

The old saying that what gets measured gets done is true. PBGC's Office of Information Technology (OIT) is committed to meeting or exceeding our people, process, and technology performance goals, measures and outcomes. To ensure that our focus remains on the critical things we need to do as an organization to remain successful, a set of key performance indicators was developed to measure successful implementation of the 2026-2030 PBGC IT Strategic Plan on an annual basis.

People KPIs

Table 2: *People Strategic Objective 1: Build, equip, and maintain a highly capable and motivated IT workforce with the competencies and tools to support current and future IT initiatives*

Performance Goals	Performance Measures	Performance Outcomes	Past Performance	2027 Performance Target(s)	Expected Outcomes(O) or Impacts(I) for the American People
SG 1: Proper Blend of Government and Contract Staff	Driven by Business Needs	Optimal Staffing Mix	Continuous	Continuous	The Corporation's employee development, staffing and performance plans align with President Trump's vision for a high-performing, accountable workforce to serve the American people. PBGC will ensure management is equipped to effectively assess individual skill levels, performance capabilities and contribution to the success of PBGC's mission.
SG 2: Address Skill Gaps within Budget Constraints	OIT staff have current Individual Development Plans (IDPs)	IDP Completion Rate	100%	100%	
	OIT staff have completed mandatory training	Mandatory Training Completion Rate	100%	100%	
	OIT staff have completed additional training to support rollout of generative and agentic SI	Percentage of staff completing additional SI training	Baseline	Baseline + 10%	

Process KPIs

Table 3: *Process Strategic Objective 1: Secure PBGC's IT to ensure confidentiality, availability, and integrity of systems and data*

Performance Goals	Performance Measures	Performance Outcomes	Past Performance	2027 Performance Target(s)	Expected Outcomes(O) or Impacts(I) for the American People
SG 1: FISMA Compliance	Annual FISMA Rating	Effective Rating	Effective	Effective	Technology modernization efforts will streamline processes and strengthen security to improve customer experience. IT modernization and cybersecurity enhancement programs support the Trump Administration's priority of leveraging technology to deliver faster more secure services. These efforts establish IT security as foundational and ensure that IT security will continue to be a top priority for the Corporation.
SG 2: Cybersecurity Framework Maturity	Maturity Level Achieved	Level 4 or Higher	Baseline	All Level 4 or Higher	
SG 3: OnTime POA&M Completion Rate	OnTime POA&M Completion Rate	95% or greater	98%	95% or greater	
SG 4: Replace Costly MTIPS Circuits	Complete Circuit Migration	Replace costly MTIPS circuits with modern commercial internet services to align with TIC 3.0, strengthen Zero Trust principles, and deliver a more efficient, cost effective, and resilient network architecture by Q2 FY28.			
SG 5: Risk Based Security Patching	Compliance with BOD 26-04	Meet Phase Deadline	N/A	Fully Phase III Compliant	
SG 6: Consolidate Reportable FISMA Systems	Number of Reportable FISMA Systems	Reduce Number of Reportable FISMA Systems	50% Reduction	50% Reduction	
SG 7: Pilot SI Based Control Assessment Tool	Efficiency Savings Performing Control Assessments	Time Reduction to Perform Control Assessments	N/A	Create Benchmark Efficiency Savings and Use for 2027 FISMA Audit Cycle	

Process KPIs (cont.)

Table 4: *Process Strategic Objective 2: Providing outstanding internal and external customer support*

Performance Goals	Performance Measures	Performance Outcomes	Past Performance	2027 Performance Target(s)	Expected Outcomes(O) or Impacts(I) for the American People
SG 1:IT Infrastructure Availability	Systems Uptime	98% or greater	99.8+%	98% or greater	PBGC will continue to standardize Information Technology (IT) platforms and tools to reduce duplication and improve interoperability by prioritizing U.S.-manufactured and U.S.-based technology solutions, consistent with Buy American requirements to enable agency efficiency by reducing duplication costs through consistent delivery making the most of innovative processes and commercial solutions. Technology modernization efforts to include the integration of Super Intelligence (SI) will streamline processes and strengthen security to improve internal and external customer experiences. IT modernization and cybersecurity enhancement programs support the Trump Administration's priority of leveraging technology to deliver faster more secure services to the American people.
SG 2: IT Service Desk Management Rated Excellent or Good	Internal Customer Support	85% or greater	97.5%	85% or greater	
SG 3: IT Incident Response Rated Excellent or Good	Internal Customer Support	85% or greater	97.1%	85% or greater	
SG 4: Align Technology Initiatives with Organizational Mission Priorities and Community Needs	Survey Business Units and Prioritize SI Generative and Agentic Solutions	Prioritize List of SI Projects	Baseline	Baseline +10%	
SG 5: Business Systems Continuous Product Improvement	External Customer Metrics	See PBGC PG 3.1: Implement improvements each year to PBGC's communications in response to customer feedback and key performance indicators for details for MyPAA and MyPBA PBGC FY 2027 Annual Performance Plan			
SG 6: Expand Customer Interface Channels using SI	Transition to an SI-enabled Contact Center by Q2 FY28	Deliver a modern, efficient, and data-driven customer call center experience	N/A	Build out supporting infrastructure to support an SI-enabled call center	

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Process KPIs (cont.)

Table 5: *Process Strategic Objective 3: Maintain Mature IT Governance to Foster Business Agility*

Performance Goals	Performance Measures	Performance Outcomes	Past Performance	2027 Performance Target(s)	Expected Outcomes(O) or Impacts(I) for the American People
SG 1: Submit OMB Exhibits, Agency IT Portfolio Summary, and Agency's IT Business Cases in a Timely Manner	Investment and Budget Mandate Compliance	Accurate and Timely Submissions	100%	100%	PBGC will ensure accountability to American taxpayers by implementing performance and accountability standards operating with transparency and accountability; preventing payments to fraudsters and eliminating waste, ensuring transparency and access to reliable information, and ensuring our contractors are held to high standards. PBGC will continue to standardize Information Technology (IT) platforms and tools to reduce duplication and improve interoperability, reducing duplication costs through consistent delivery making the most of innovative processes and commercial solutions.
SG 2: Adopt Product Management Practices that Emphasize Customer Feedback, Rapid Iteration and Measurable Outcomes.	Business applications use Agile and Continuous Product Improvement.	Business Agility	80% of Business Applications in CPI	90% of Business Applications in CPI	
SG 3: Use Agile Delivery Methods to Shorten Development Cycles and Increase Responsiveness	Approved Product Improvements are complete on schedule and within budget.	Business Agility	Baseline	90%	
SG 4: Overall Compliance with Executive Orders, OMB Memorandums, and Binding Operational Directives	Mandate Compliance	Accurate and Timely Submissions	100%	100%	
SG 5: Conduct Enterprise Data Analysis	Completion and Concurrence by IPT	Completion of Enterprise Data Strategy, Modernization and Transition Plan(s) and Data Models	N/A	100%	
SG 6: Reduce/Eliminate Duplicative Data Collection	Percentage of Duplicative Collections/And Percentage Volume of Duplicate Data	Lessen Operational Resource Demands/Improve Data Integrity	N/A	Complete analysis of existing PBGC data structure to eliminate duplicative data and reduce operational resource demands	

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Technology KPIs

Table 6: *Technology Strategic Objective 1: Modernize and innovate PBGC's IT solutions leveraging Super Intelligence (SI) to transform business processes, to improve delivery time, enhance security. and improve fraud detection.*

Performance Goals	Performance Measures	Performance Outcomes	Past Performance	2027 Performance Target(s)	Expected Outcomes(O) or Impacts(I) for the American People
SG 1: Deploy Generative SI Tools	Staff have access to one or more generative SI tools	Percent of staff with access to one or more generative SI tools	100%	100%	PBGC has developed a cross-departmental Super Intelligence (SI) Workgroup led by a Chief Super Intelligence Officer to accelerate and promote responsible use of SI innovations. Robust efforts are underway to build effective policies processes for safe deployment and efficient use of SI. The Corporation is also examining several platforms such as Microsoft 365 Copilot, Perplexity, and ServiceNow Now Assist. New SI use test cases began in early 2026. This forward-learning approach is designed to help shape the future of PBGC's operations and will bring the best value to taxpayers through delivery of service. In addition, PBGC's technology modernization efforts will streamline processes and strengthen security to improve customer experience. IT modernization and cybersecurity enhancement programs support the Trump Administration's priority of leveraging technology to deliver faster more secure services. By leveraging PBGC's technology architectures and maximizing the Administration's strategy and priorities for a secure Digital Government, IT capitalizes on a cost-effective mix of cloud technologies, shared/managed services, and internal solutions that adhere to Government-wide standardized policies and procedures.
SG 2: Percent of Staff Completing PBGC-wide Mandatory SI Training	Staff have completed mandatory training	Mandatory Training Completion Rate	100%	100%	
SG 3: Percent of PBGC Staff Taking Specialized SI Training	Staff have completed specialized SI training	Percentage of staff completing specialized SI training	Baseline	Baseline +20%	
SG 4: Number of SI Use Cases in Production	Production SI Use Case Count	Number of Production SI Use Cases SI	Baseline	Baseline +50%	
SG 5: SI Generated Mission Efficiency Improvements	Cycle-time reductions for targeted business processes		Baseline	Baseline +50%	
	Measured improvements in throughput, accuracy, or response times		Baseline	Baseline +50%	
SG 6: Continue to Leverage Cloud Based Solutions	Complete Cloud Migration	Complete enterprise cloud migration by Q2 FY28, fully retiring and decommissioning all remaining co-located data centers and OWS WAN rings thereby fully achieving a modern, scalable, and cost-efficient infrastructure aligned with the agency's long-term cloud-first IT strategy			

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Major Management Challenges

PBGC's Office of the Inspector General issued a report on the "Top Management and Performance Challenges Facing PBGC in FY 2025." The Corporation continues to actively work on these four important management and performance challenges of (1) strengthening PBGC's information technology; (2) Contracting Officers' Representative's oversight of contracts; (3) human capital: mission critical skills; and (4) acquisition challenges.

The 2027 Annual IT Performance Plan focuses on concrete actions designed to strengthen PBGC's information technology program, ensuring that IT staff have the mission-critical skills needed to perform their roles, and that IT acquisitions are consistent with applicable Executive Orders and in compliance with applicable law. In addition, these measures ensure the agency remains on target to achieve its mission of promoting retirement security for Americans with defined benefit pension plan benefits. This Plan will be reviewed and updated annually to monitor progress and make any course corrections needed as challenges arise. These actions align with both President Trump's Management Agenda and Fiscal Plan for bolstering confidence in America's fiscal management to deliver strong outcomes, provide quality services, and effectively steward American taxpayer dollars.

Enterprise Risk Management

The Enterprise Risk Management (ERM) program is an important part of strategic planning. PBGC has implemented a robust ERM program that focuses on nine categories of risk: external, financial, human capital, insurance, legal, operational, reputational, strategic, and technology.

As PBGC developed its IT Strategic Plan for FY 2026-2030, OIT considered risks that may impact the realization of its mission, strategic goals, and objectives. Additionally, each year when formulating the Annual IT Performance Plan, departments are surveyed about their risks. The agency will continue to complete annual risk assessments, resulting in a holistic risk profile listing of top entity-wide risks and related mitigation strategies. By integrating the results of ongoing risk assessments into strategic planning and organizational performance management, the Office of Information Technology will continue to improve budgeting, operational, and resource allocation planning. Given the rapid pace of change in technology, OIT will be influenced by unpredictable events that may force changes to strategic and operational goals over the four years covered in this planning cycle.