

**CHIEF INFORMATION OFFICER MATRIX**  
**INFORMATION TECHNOLOGY SERVICES BRANCH**  
**September 17, 2013**

**Board Assignment Status**

Assign. Date	Request / Subject	Due Date	Status / Completed Date
Item of Interest	Status / Completed Date		
Pension and Health Services	<p><b>My CalPERS</b> – Following Final System Acceptance and the adoption of a my CalPERS Transition Roadmap in April, efforts to close out Project activities completed in June and transition to an ongoing my CalPERS support program began in July. An assessment of completed and remaining Strategic Goals and Key Performance Indicators was developed by August, with review and approval anticipated in September. Release Capacity models were expanded and refined to meet current business needs and resource availability for the new maintenance and operations program phase. Knowledge Transfer (KT) increased in priority; the scope of KT artifacts and individual KT plans to cover the breadth of system capabilities are under development, along with progress tracking and reporting tools. The KT 'refresh' program launched in August and will roll-out across the technical development staff throughout September. Additionally, the focus on enhancements continues: a major release was implemented at the end of July for Open Enrollment, Annual Member Statements, Tax Redesign, Pension Reform, and Health Plan Name Changes. The next release is planned for early September for Mandatory Refunds, Complementary Annuitant Premium Program (CAPP) Redesign, Cognos Reporting upgrades, and additional enhancements for annual processes.</p> <p><b>Member Self Service (MSS)</b> – The ability to modify beneficiaries was introduced in early August, allowing members to add and modify beneficiary information. The team continues to work with Public Affairs on developing marketing strategy, including the creation of an Employer Marketing Kit which is being piloted in advance of the Employer Educational Forum. MSS team members will staff a member self-service booth at the Educational Forum in October to help raise awareness of the expanded self-service and the benefits MSS can offer to employers. The team is also in the test phase for the CallAM (Identity Access Management) release, scheduled for October 27, offering improved ease of use for password resets, introduces password resets by text or email, and additional enhanced security features.</p> <p><b>Contact Center Upgrade</b> – The redesign of the Interactive Voice Response (IVR) system is in progress. Stakeholder interviews and metrics analysis were completed in July 2013. Baseline usability testing is scheduled for early September with 18 active and retired members. Following analysis of findings, a redesigned navigation and updated script will be developed for further testing, scheduled for November 2013. Design is scheduled for completion in December 2013.</p> <p><b>VoIP Update</b> – In Fiscal Year 2011-2012, ITSB initiated a VoIP pilot to replace the aging CalPERS enterprise telephone system. The pilot included 150 users across multiple program areas at the Lincoln Plaza Headquarters complex. The objective was to test telephony and voicemail functionality requirements, system integration with critical systems such as the E911 Emergency Response System, and develop an enterprise VoIP rollout plan that included the phased decommission of the legacy telephone system. The phased rollout includes the CalPERS regional office locations, Lincoln Plaza Headquarters, and the EOC.</p> <p>ITSB has rolled out VoIP phones to the regional offices, and decommissioned the legacy telephone systems in those locations. We have achieved a savings of \$250,000 in 800 telephone services and \$60,000 for long distance services to Regional Offices. The Lincoln Plaza Headquarters rollout is being implemented in conjunction with the cubicle re-stack project. To date, approximately 650 VoIP phones have been deployed. The next targeted locations for deployment are the 5th floor of the Lincoln Plaza West Building and the 4th floor of the Lincoln Plaza North Building both scheduled for completion in December 2013.</p>		

CalPERS Business Intelligence	<p><b>CalPERS Business Intelligence Program</b></p> <p>During the 2011-2012 Fiscal Year, CalPERS successfully executed a project that built an enterprise Business Intelligence program. As part of this accomplishment, CalPERS developed a roadmap that guides actions in the coming years. During the 2012-2013 Fiscal Year, the Business Intelligence Program focused on a single Business Plan Objective. The work associated with this objective delivered new reports and insights to the Customer Service and Support. In 2013-2015 Business Plan there is now three business objectives that state direct reliance upon the Business Intelligence Program and several others that expressed additional needs. The three primary business objectives are part of Strategic Goal B – Cultivate a high-performing, risk intelligent and innovative organization, and are as follows:</p> <ul style="list-style-type: none"><li>• <b>End-to-End Business Intelligence</b> – Enhance end-to-end services through the use of business intelligence by enhancing enterprise research, innovation and organizational performance (June 2015)</li><li>• <b>Service Delivery Transformation: Effectiveness</b> – Implement business intelligence analytics, member self-service enhancements, and improved marketing that ensure resources are efficiently utilized to deliver timely, helpful and effective services (June 2015)</li><li>• <b>Strategic Measures</b> – Develop and implement strategic measures that utilize business intelligence tools to evaluate enterprise results and assess effectiveness of the CalPERS 2012-2017 Strategic Plan; and to assist with the long-term strategic decision making and planning process (June 2014)</li></ul> <p><b>Objectives Progress</b> – Currently, the Business Intelligence Program is working with the business owners of each objective to define the requirements of what is expected to be delivered this fiscal year. However, data and information is already being delivered to the customers in an iterative fashion so that they can gain use it to refine their plans for the year and progress on their individual needs.</p> <p><b>CalPERS Business Program Support</b> – Separate from the Business Objective work, the Business Intelligence program continues to support key business needs by responding to daily incoming requests.</p> <p><b>Business Intelligence Program Development</b> – A major focus of maturing CalPERS Business Intelligence Program this year is to create the necessary governance. An initial Business Intelligence Program Committee has been established based upon the stakeholders of the three business objectives (above). The governance committee is currently working to develop their charter and key decision-making processes.</p>
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<p>Enterprise Resource Planning (Financials, Human Resources, Procurement, etc.)</p>	<p>PeopleSoft Time &amp; Labor Implementation – This initiative is designed to move towards more efficient and effective operations within Human Resources by implementing the Time and Labor HCM module which will allow the paperless automation of monthly timesheet creation, submission, review and approval. The Time &amp; Labor implementation will be completed in three phases: Phase 1 rolled out to a pilot group of users in April 2013; Phase 2 is in progress with a focus on stabilization accomplished through iterative releases and continued expansion of the Pilot group. Currently, all of HRSD, ITSB and PAOF are using automated time sheets. The team is engaged in performance testing and working to develop enterprise training materials. Phase 3 will roll-out to the remaining enterprise in November 2013.</p>
<p>Enterprise Content Management</p>	<p>The Enterprise Content Management Program development continues with the formal establishment of the governing body. A draft charter is complete for the Steering Committee’s review and approval, outlining the program mission, approach, and scope, as well as Roles and Responsibilities for the governing body. Separate workgroups are working concurrently on the Governance Model, Content Planning, and Social Networking. The workgroups will present draft plans and policies to the Steering Committee for their approval in the first quarter of FY 13/14.</p>
<p>IT Security Roadmap</p>	<p>The Security Roadmap Program (SRP) is an ongoing multi-year effort that will ensure CalPERS technology and information remains secure against the constantly changing landscape of threats. This Program includes prioritized yearly initiatives and deliverables focused on implementing the latest preventative measures.</p> <p>The initial phase (Phase 1) of the SRP was successfully delivered on June 30, 2012. This phase included updating a number of CalPERS security policies with the most current knowledge on how to protect organizations. Reducing risks inherent in mobile devices by improving our ability to secure and manage them (tablet computers, smartphones, etc). CalPERS completed the changes necessary to be in compliance with federal computer security standards for desktop computers. Technology was enhanced to prevent the introduction of malicious programs that could infect CalPERS computer systems as well as solutions to prevent against sensitive/secure/private data getting into the wrong hands.</p> <p>In July we began Phase 2 of the SRP. This phase includes an assessment of our remote access technology to ensure there are no vulnerabilities. We plan to make improvements to our network access controls to ensure unauthorized devices cannot connect to our corporate network. CalPERS will explore the expansion of the my CalPERS identity management solution for enterprise purposes. We will be improving our eDiscovery capabilities not only to reduce risk but to make the process much more efficient. In addition, we will be improving our patch management processes, systems, and compliance on desktops, servers and 3rd party applications to improve our protection against today’s elevated threat landscape.</p>
<p>Disaster Resiliency</p>	<p><b>Disaster Recovery</b> – CalPERS is planning and evaluating appropriate dates in early 2014 for the next disaster recovery test with EMC/Sungard. In addition to the key CalPERS infrastructure components tested during the last exercise, the scope of the upcoming exercise is expected to address recovery and validation of my CalPERS, including the new identity access management functionality.</p>