

CHIEF INFORMATION OFFICER MATRIX
INFORMATION TECHNOLOGY SERVICES BRANCH
November 19, 2013

Board Assignment Status

Assign. Date	Request / Subject	Due Date	Status / Completed Date
Item of Interest		Status / Completed Date	
Pension and Health Services	<p>my CalPERS – There are several significant activities currently underway in support of my CalPERS. Major releases of changes to my CalPERS were implemented in September and October for annual member statements, tax redesign, flex spending, non-centralized billing, mandatory refunds and Cognos reporting upgrades. Additional changes will be implemented with two major releases scheduled for December. Approval was received in September for conducting a Post Implementation Evaluation Report (PIER +) of the PSR Project to assess the completed strategic goals and key performance indicators (KPI's) and identify the goals and KPI's that remain to be addressed with maintenance and operations (M&O) activities. There is also a significant effort underway to identify and address the activities necessary to transition from a project mode in support of the PSR Project to an effective and responsive M&O state in support of the my CalPERS production system. The key areas that will be included in this transition effort include: identification of changes to some technical aspects of my CalPERS, such as application and data architecture, to enhance maintainability; a review of support resource needs, including staffing, hiring, training and the transfer of system knowledge from contractors to State staff; an assessment of the current inventory of pending changes to the my CalPERS system, and; changes to various processes and practices, such as the change control process and practices supporting build and deploy activities, to transition to an enterprise support model for future my CalPERS M&O activities.</p> <p>Member Self Service (MSS) – Streamlined processing for adding and changing Health dependents was added in September. New Address Change authorization forms were introduced in October, along with expanded Direct Deposit and Warrant history. The team continues to work with Public Affairs on developing marketing strategies, including the creation of an Employer Marketing Kit which was piloted in advance of the Employer Educational Forum. MSS team members supported a member self-service booth at the Educational Forum in October to help raise awareness of expanded self-services 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 February 2, offering improved ease of use for password resets and additional enhanced security features.</p> <p>Contact Center Upgrade – Progress continues on the redesign of the Interactive Voice Response (IVR) system, and several key milestones have been met. Following completion of the initial discovery phase, usability testing was conducted with 18 CalPERS members to gather feedback on our current system. We are now in the design phase and are using customer feedback, analytics, and stakeholder interviews to develop a streamlined navigation and script. The design will go through a round of usability testing in mid-November to ensure that the design meets our customers' needs. Following analysis of the customer feedback, design will be finalized in early January and development activities will begin.</p> <p>VoIP Update – 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 completed the VoIP phone rollout to all of the regional offices. Enterprise deployment of VoIP phones to Lincoln Plaza Headquarters staff has begun. To date, approximately 1,200 of 4400 VoIP phones have been deployed. Future deployments will be targeted by organization divisions with completion by June 30, 2014.</p>		

CalPERS Business Intelligence	<p>CalPERS Business Intelligence Program</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">• End-to-End Business Intelligence – Enhance end-to-end services through the use of business intelligence by enhancing enterprise research, innovation and organizational performance (June 2015)• Service Delivery Transformation: Effectiveness – 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)• Strategic Measures – 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) <p>Objectives Progress – Currently, the Business Intelligence Program is working with the teams that are responsible for each of the business objectives. The program is currently working on metrics regarding Member Self-Service utilization in comparison to traditional member contact/communication channels metrics. In addition, on-going support to deliver information to support the Cost-Effectiveness Measurement (CEM) report.</p> <p>CalPERS Business Program Support – Separate from the Business Objective work, the Business Intelligence program continues to support key business needs by responding to daily incoming requests. New SAS Analytics environment and training has been put in place in order to support Health studies being performed by Center for Innovation.</p> <p>Business Intelligence Program Development – A major focus of the CalPERS Business Intelligence Program this year is to continue maturing the structure and processes. Currently, the program is working on developing a stronger operating model that clearly defines roles, responsibilities and processes that will aid in being more efficient and effective.</p>
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<p>Enterprise Resource Planning (Financials, Human Resources, Procurement, etc.)</p>	<p>PeopleSoft Time & 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 & 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 HRSD, ITSB, PAOF, CDOP, ESPD, OSSD, EXAB, TCO, and CSS are using e-timesheets. Performance testing has completed and user training is in progress. Phase 3 will roll-out to the remaining enterprise in November 2013.</p> <p>Contracts Integration into PeopleSoft Financials (SCM) – This project is responsible for integrating two PeopleSoft applications (Contracts & Financials) into a single standalone system. Integrating the two systems will give the organization a single data source and remove the need for additional hardware, software and excess staff support. The project will be completed in two phases: Phase 1, scheduled to be completed in February 2014, will merge the systems while preserving all existing data and functionality found within the individual applications; Phase 2, scheduled to be ready for implementation in May 2014, will perform a fit/gap analysis and deliver functionality to better the end-to-end process between Contracts and Financials.</p> <p>PeopleSoft eProcurement Implementation – This initiative will improve the efficiency of CalPERS’ goods and services procurement processes, reduce procurement cycle time, decommission the use of an internally developed and difficult to maintain system, and enhance the visibility of procurement status to stakeholders by implementing the PeopleSoft eProcurement module and integrating it with the existing purchasing and contracts processes. Project initiation is complete, the project charter is approved and the project schedule will be base-lined the first week in November. Requirements definition will complete in early November and system design work has started. The eProcurement module and related business processes will be ready to implement in May 2014.</p>
<p>Enterprise Content Management</p>	<p>The Enterprise Content Management Program’s charter has gone through multiple review cycles and is out for final comments before approval. The FY 13/14 Spending Plan is being finalized to be presented to the Steering Committee at the November meeting. The ECM Content Transition plan, prepared by the content workgroup has been presented to the Steering Committee. An email communication to the DCC informing them of the ECM Content Transition plan is being readied and is planned to be released in early November. The Social Networking workgroup will be presenting the Socialcast roles and responsibilities to the Steering Committee for their approval at the November meeting.</p>

IT Security Roadmap	<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>Phase 2 of the SRP is underway. This phase includes an assessment of our remote access technology to identify 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 and servers to improve our protection against today's elevated threat landscape.</p> <p>SRP Progress – in the 1st quarter the team has begun work on all six of the planned projects. Resources are being identified and project managers have been on boarded. Three projects have completed planning and begun execution with the remaining three on track to do so by the end of the 2nd quarter.</p>
Disaster Resiliency	<p>Disaster Recovery – The scope for the disaster recovery test February 24-28 is set with the primary objective as restoring and validating my CalPERS, including the new identity access management functionality. The secondary objective will be to restore Investment's share folders.</p>