

CHIEF INFORMATION OFFICER MATRIX
INFORMATION TECHNOLOGY SERVICES BRANCH
December 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>my CalPERS – In November, my CalPERS transition activities continued to focus on implementing a systemic support program and enhance service quality. Change Lifecycle processes collaboratively managed release demand and capacity for November system corrections and enhancements. Planning for releases through January is nearly complete. Tools to more closely manage work efforts were implemented and business/IT have partnered to close the gap between planned and actual service commitments. The Knowledge Transfer (KT) program to transition expertise from Accenture to CalPERS gained momentum; by mid-November, KT for 900+ business functions is in progress, with baseline proficiency is on target for completion in March. KT Phase II will extend through 2014, adding depth of expertise to CalPERS support services. Additionally, the focus on my CalPERS system enhancements continues: two major releases for December are underway, including updates and enhancements to the Power Purchasing Protection Allowance (PPPA) program, Cost of Living Adjustment (COLA), Tax changes, Public Employees' Pension Reform Act (PEPRA) tier packages, and Complementary Annuitant Premium Program (CAPP) Redesign.</p> <p>Member Self Service (MSS) – In November, Online Health services were streamlined and expanded to include new Health Plan options, the addition of new carriers, and detailed plan information. On November 15th, CalPERS Annual Member Statements (AMS) were made available online; statements for Judges and Legislators are in progress and anticipated by early December. The team additionally continues to work with Public Affairs on developing marketing programs for self-service options; the Employer Marketing Kit to help raise awareness of expanded self-services and the benefits MSS can offer to employers, as well as members, rolled out in November; Kit materials will be included in employer orientation packages. 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 – The redesign of the Interactive Voice Response (IVR) system is proceeding as scheduled. The focus of the redesign is to improve the overall customer experience, and also takes advantage of the skill-based routing technology that was implemented last fiscal year. The new design is expected to improve the experience for our customers, and also improve efficiencies in handling calls in the contact center. A redesigned navigation tree and revised script were prepared for usability testing to evaluate improvements in ease of use, clarity, and overall customer experience. Testing will be conducted with 18 participants representing a diverse range of our member base. Analysis of the customer feedback will be presented in early December, along with recommendations for final design adjustments. A final script will be presented for approval by the project team in January. Development activities are still on track to begin in January.</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. Staff have been rolling out between 200-250 VoIP phones per month to employees at the Lincoln Plaza Complex. To date, approximately 1,500 of 4,400 VoIP phones have been deployed. ITSB is on pace to roll out 3,200 VoIP phones to CalPER business programs by June 30, 2014. Since a high number of legacy phones are being replaced by VoIP phones, staff are re-negotiating with the vendor to reduce the cost of the maintenance contract for the legacy phone system. Any savings achieved through contract re-negotiation will be provided in future reports.</p>		

CalPERS Business Intelligence	<p>CalPERS Business Intelligence Program 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 are three business objectives that leverage the Business Intelligence Program. 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. In particular, the program continues to provide my CalPERS Member Self Service (MSS) utilization metrics enabling targeted marketing for expanded MSS usage by participants. Furthermore, the program is providing the Office of Audit Services retired member data used by Public Agencies for benefit determination thus offering an additional means for fraud detection.</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. In addition to ongoing Public Record Act and Ad Hoc requests, recent work includes providing the Chief Financial Officer and Chief Counsel with data relating to the City of San Bernardino.</p> <p>Business Intelligence Program Development – A major focus of maturing CalPERS Business Intelligence Program this year is to continue maturing the structure and processes. Challenges facing the technology platform that delivers software and reporting solutions to the program has been identified and is being addressed. These challenges include performance issues affecting the Center for Innovation and the down time of production servers supporting Customer Services and Support workflow reports. Recent focus has been on identifying business needs for fiscal year 2014-2015 and the necessary resource capacity to address current baseline and projected work.</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 was completed in three phases: Phase 1 rolled out to a pilot group of users in April 2013; Phase 2 focused on stabilization, which was accomplished through iterative releases and continued expansion of the Pilot group. Phase 3 rolled-out e-timesheets to the remaining enterprise in November and the project is now in the closing phase.</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. The project Initiation & Planning phases are complete and the team is currently working on design and build phase activities.</p> <p>PeopleSoft eProcurement Implementation – This initiative will improve the efficiency of CalPERS’s goods and services procurement processes, reduce procurement cycle time, 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 and the project schedule has been base-lined. Requirements definition has been completed and the team is actively working on system design issues. We will begin configuration of a proof-of-concept system in December. The eProcurement module and related business processes will be ready to implement in May 2014.</p>
<p>Enterprise Content Management</p>	<p>Enterprise Content Management (ECM) – The ECM Charter and spend plan have been drafted and will be submitted to the steering committee at the December meeting for final approval. An email communication to the DCC informing them of the ECM Content Transition plan has been drafted and is being prepared to be sent out before the end of November. The SharePoint 2013 Architecture Upgrade design has been submitted to Enterprise Architecture Services for subject matter expert review. An FBR has been drafted for FY 14/15 to request staff augmentation via C&P to assist in meeting content migration deliverables and provide additional technical knowledge transfer to state staff on the new SharePoint architecture along with additional training funds. All the division web site searches on Insider have been migrated to SharePoint from Google Search Appliance to avoid renewal costs of approximately \$70,000 in December.</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>Phase 2 of the SRP is underway. This phase includes an assessment of our remote access technology 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 plan to improve 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 – After onboarding the appropriate staff, and good scope discussion, we have gained approval for 3 of the 6 project charters. We are targeting gaining approval for the remaining project charters by the end of January. Work is progressing on all 6 of the planned projects. In addition to Phase 2 work, the team has done an extensive re-assessment of the information security risks and prioritized work for Phase 3. The scope of this work has been approved by the Security Roadmap Program Steering Committee and is now progressing through the CalPERS governance and budget cycles.</p>
<p>Disaster Resiliency</p>	<p>Disaster Recovery Planning – The 2014 CalPERS Technical Recovery Plan (formerly named the Disaster Recovery Plan) is in the final stage of review and approval.</p> <p>Operations Recovery – ITSB has recently refreshed computer equipment at the Emergency Operations Center (EOC) with the latest standard software and security updates. This ensures desktops, servers, and laptops are up-to-date with hardware and software needed in case of a disaster. In addition ITSB successfully created a backup of the largest my CalPERS images database to the EOC. The size of this database is equal to 3.7 million songs.</p> <p>Disaster Recovery Exercise – The February 24-28 disaster recovery test plan is on schedule. Sixteen critical business functions related to my CalPERS will be validated. ITSB made significant progress in inventorying all the applications, sub-systems, databases and infrastructure components that need to be duplicated at the New Jersey SunGard disaster recovery facility.</p>