



Agenda Item 9a

March 18, 2014

ITEM NAME: Business Intelligence (BI) Update

PROGRAM: Enterprise

ITEM TYPE: Information

EXECUTIVE SUMMARY

With the increased demand for timely, reliable and accessible information, CalPERS initiated an enterprise-wide Business Intelligence (BI) program in 2011 to analyze its growing records (big data) for enhanced risk-intelligent decision making. With a collaborative partnership between program and technology, CalPERS is utilizing BI for strategic performance, tactical analysis, and enhanced operational services for its members and employers.

BI utilizes a broad collection of knowledge, skills, processes, practices and technology to extract information from a wide variety of data sources for better decision making. BI allows for immediate access to accurate information by distilling member and employer trends. This results in:

- Timely and enhanced insight into member needs
- Innovative approaches to services
- Deeper understanding of the impact of market trends
- Comprehensive assessment of proposed legislation and policy changes

BI is less about tools and more about how people use knowledge, skills and information to become more business intelligent. BI can transform a business, improving operational efficiency and effectiveness and supporting innovation to meet strategic goals. This presentation will highlight CalPERS BI Program, accomplishments and current initiatives.

STRATEGIC PLAN

This agenda item supports Strategic Plan Goal B to "Cultivate a high-performing, risk-intelligent and innovative organization." BI provides the framework for risk-intelligent decision making and innovative programs to better serve the CalPERS community.

BACKGROUND

In 2011, the BI team was formed to evaluate the current and future analytical needs of the CalPERS enterprise. A 5-year roadmap was developed with the goal of incrementally maturing CalPERS BI program across the organization.

Today, the BI program makes information more accessible for improved decision-making by using advanced analytics to accelerate research, to create a Strategic Performance Dashboard, to express the Voice of the Customer, and to enhance service operations. Key accomplishments include:

- **Center for Innovation (CFI)** - Provided analytics environment that enabled CFI to perform research to support CalPERS Health Strategy, enabling CalPERS to negotiate lower rates to the benefit of its members and employers.
- **Customer Services and Support (CSS)** - Provided workload metrics and detailed workflow reports to monitor compliance with a board-reportable commitment to resolve 70 percent of escalated inquiries within five business days, improving service quality.
- **Enterprise Strategic Planning Division (ESPD)** – Improved the data collection and reporting platform for the Annual Benchmarking Survey by Cost Effectiveness Measurement (CEM), establishing a consistent foundation for future survey participation.

ANALYSIS

An overview of CalPERS BI Program, accomplishments and current initiatives will be presented orally, along with industry trends and best practices.

ATTACHMENTS

Attachment 1 – Business Intelligence Update Presentation

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