

**CHIEF INFORMATION OFFICER MATRIX**  
**INFORMATION TECHNOLOGY SERVICES BRANCH**  
September 16, 2014

**Board Assignment Status**

Program Name	Project Name	%	Major Accomplishments (This Reporting Period)	Business Benefit
<p>my CalPERS</p> <p><i>Description: The Accenture Knowledge Transfer (KT) program is a one-year effort focused on incrementally building breadth and depth of my CalPERS knowledge for State staff through Accenture mentoring and performance-based Individual Development Plans (IDPs). Through development of a sustainable knowledge transfer model that continuously increases proficiency, staff expertise is measured against progress goals aligned with complexity levels required for independence in providing ongoing system maintenance and enhancements.</i></p>	<p>Accenture Knowledge Transfer (KT)</p>	<p>90%</p>	<ul style="list-style-type: none"> <li>• Accenture contract remains on schedule to complete mid-September.</li> <li>• State Staff successfully executed June and July year-end processing activities without Accenture's assistance.</li> <li>• Completed cross-training in four of six major functional domains, with Benefits and Financials on schedule to complete in mid-September.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensures transfer of my CalPERS expertise to State staff.</li> <li>• Improves ongoing operational service quality.</li> <li>• Allows future system enhancements to be made without reliance on the Accenture system integrator.</li> <li>• Increases subject matter expertise across all business functions.</li> </ul>
<p>my CalPERS</p> <p><i>Description: The IVR Redesign &amp; Streamlining initiative is a one-year effort focused on improving the experience for CalPERS customers calling our automated phone system. Through multiple rounds of usability testing with members, the navigation and script will be streamlined and optimized for the skill-based routing features of the system.</i></p>	<p>Integrated Voice Response (IVR) System</p>	<p>Completed</p>	<ul style="list-style-type: none"> <li>• Successfully implemented the redesigned IVR on July 17.</li> <li>• IVR Redesign Project is now completed and monitoring will continue to ensure usability goals are achieved.</li> </ul>	<ul style="list-style-type: none"> <li>• Improves customer experience by streamlining navigation and speeding up time to get to call agent.</li> <li>• Maximizes use of skill-based routing to ensure calls are being directed efficiently.</li> </ul>

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my CalPERS	Security Management  (formerly CalPERS Identity and Access Management, CallAM)	Completed	<ul style="list-style-type: none"> <li>Authorization to evaluate alternatives for new security management reporting and forensic analysis enhancements for my CalPERS was approved by the Steering Committee on August 22. Analysis activities are expected to start in September.</li> <li>Completed 100% of design and coding activities for implementation of pop-up reminders for upcoming password expiration dates. Implementation is on schedule for September 7.</li> </ul>	<ul style="list-style-type: none"> <li>Improves fraud prevention.</li> <li>Promotes proactive risk management.</li> <li>Personalizes verification of user authenticity.</li> <li>Further reduces fraud risk through member election of access needs.</li> <li>Encourages members to update their status with life style event changes.</li> </ul>
my CalPERS  <i>Description: The my CalPERS Functional Optimization Project is an effort to develop and implement prioritized functional optimization initiatives in support of the my CalPERS platform and infrastructure environment. These optimizations will be in addition to the existing maintenance and operation needs of the my CalPERS system. A partner vendor will work collaboratively with key CalPERS staff in the definition, development, and delivery of these optimizations.</i>	Functional Optimization	Vendor Selection Phase 60%	<ul style="list-style-type: none"> <li>The my CalPERS Functional Optimization Request for Proposal (RFP) was released on July 1, as planned.</li> <li>A Bidder's Conference was conducted on July 10, with approximately forty vendors in attendance.</li> <li>Thirteen (13) vendors submitted their Intent to Participate on July 18, with Confidential Discussions requested by seven (7) vendors. The Confidential Discussions were conducted on August 4-7.</li> <li>Vendor proposals are due for submission on August 29.</li> <li>Proposal evaluations will begin on September 2 and are</li> </ul>	<ul style="list-style-type: none"> <li>Establish a collaborative vendor partnership in order to deliver value in support of functional optimization initiatives for the my CalPERS system and infrastructure environment.</li> <li>Expedition and improvement of services to all CalPERS customers, internal and external.</li> <li>Continuous progress, quality, and performance measurement of functional optimization activities against success goals.</li> </ul>

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			expected to complete by September 30.	
<p>my CalPERS</p> <p><i>Description: The my CalPERS Process and Tools Optimization (PTO) project is a preliminary effort to the Functional Optimization Project. This effort will refine and optimize maintenance and operation activities and tools that support the my CalPERS system. These processes will be used for all future M&amp;O activities, as well as all activities in support of the Functional Optimization project.</i></p>	Process and Tools Optimization (PTO)	<p>10%</p> <p>(On Target – Due: 11/30/14)</p>	<ul style="list-style-type: none"> <li>A vendor was selected to provide process and tools optimization (PTO) assistance to the my CalPERS Maintenance &amp; Operations (M&amp;O) framework in preparation for the Functional Optimization activities scheduled for November.</li> <li>PTO project activities are expected to begin by September 1.</li> </ul>	<ul style="list-style-type: none"> <li>Improve quality of my CalPERS changes and enhancements.</li> <li>Improve productivity of my CalPERS resources.</li> <li>Improve utilization of tools for tracking progress and performance.</li> <li>Increase communications across ITSB in support of M&amp;O activities.</li> </ul>
<p>Enterprise Resource Planning (ERP)</p> <p><i>Description: The ERP Program oversees an ongoing multi-year effort that aligns CalPERS technology, information, and automated processes with CalPERS strategic goals for our administrative functions. This Program governs the ERP Roadmap, prioritizing yearly initiatives and deliverables.</i></p>	Contracts Integration with PeopleSoft Financials	Completed	<ul style="list-style-type: none"> <li>Successfully deployed all features.</li> <li>Project has been closed, was delivered on schedule and under budget.</li> </ul> <p>This is the final update.</p>	<ul style="list-style-type: none"> <li>Facilitates contract process tracking efficiencies.</li> <li>Improves status reporting capabilities.</li> <li>Saves organization costs by reducing need for additional hardware, software, and support personnel.</li> </ul>
Enterprise Resource Planning (ERP)	eProcurement Implementation	Completed	<ul style="list-style-type: none"> <li>System went live on July 1<sup>st</sup>.</li> <li>Completed Knowledge Transfer to State Staff.</li> <li>Project has been closed and project documentation has been archived.</li> </ul> <p>This is the final update.</p>	<ul style="list-style-type: none"> <li>Streamlines ordering, enforces spending policy, and eliminates duplicate key entry.</li> <li>Reduces procurement costs.</li> <li>Reduces the cycle time and cost of procurement.</li> </ul>

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<p>Enterprise Content Management (ECM)</p> <p><i>Description: The ECM project is a multi-year effort that includes content transition activities including training curriculum for content evaluation, user experience, information architecture, CalPERS Brand, Style, and SharePoint. In addition, the project improves the overall user experience and delivers information in an intuitive, searchable format.</i></p>	<p>Inside CalPERS Content Transition</p>	<p>40%</p> <p>(On Target – Due: 12/31/15)</p>	<p>In preparation for the upcoming migration of five (5) divisions</p> <ul style="list-style-type: none"> <li>• Trained content approvers</li> <li>• Transitioned content</li> <li>• Held kick-off sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Enhances consistency and quality of enterprise communication.</li> <li>• Improves operational efficiencies.</li> </ul>
<p>Enterprise Content Management (ECM)</p>	<p>Website Usability Initiative</p>	<p>60%</p> <p>(On Target – Due: 6/30/15)</p>	<p>CalPERS Internal community</p> <ul style="list-style-type: none"> <li>• Monitored feedback from Member Pilot roll out</li> <li>• Applied updates to Member Pilot based on feedback and quality assurance reviews</li> </ul> <p>Business Partner update</p> <ul style="list-style-type: none"> <li>• Continued analysis and design of content</li> <li>• Completed stakeholder meetings</li> <li>• Drafted Site Map (website information outline)</li> <li>• Completed the build, review and approval of five (5) custom application prototypes</li> </ul>	<ul style="list-style-type: none"> <li>• Improves customer experience/satisfaction with accessing CalPERS information.</li> <li>• Lowers operational costs by increasing percentage of customer self-service for informational requests.</li> <li>• Improves CalPERS Brand image.</li> </ul>

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<p>Disaster Resiliency</p> <p><i>Description: Annually, the CalPERS Information Technology Services Branch conducts a Disaster Recovery Exercise to evaluate and improve our technical recovery plans.</i></p>	<p>Disaster Recovery / Backup Restore Request for Proposal</p>	<p>5%</p> <p>(On Target – Due 2/29/15)</p>	<ul style="list-style-type: none"> <li>Existing Disaster Recovery contract is expiring and CalPERS is in the process of developing requirements and releasing a new Request for Proposal (RFP).</li> </ul>	<ul style="list-style-type: none"> <li>Minimize business disruption and downtime</li> <li>Minimize financial impact</li> <li>Vital Records and information assets preservation</li> <li>Improve recovery capabilities for all critical systems</li> </ul>
<p>Security Roadmap Program (SRP)</p> <p><i>Description: The SRP is an ongoing multi-year effort that ensures CalPERS technology and information remains secure against the constantly changing landscape of threats. This program includes priorities, yearly initiatives and deliverables, focuses on implementing the latest preventative measures.</i></p>	<p>* Network Access Control (NAC)</p>	<p>90%</p> <p>(Behind Schedule - Due: TBD)</p>	<ul style="list-style-type: none"> <li>Testing revealed a major defect in the vendor product. We are working with the vendor on defect resolution and retesting. Once resolution is received a new implementation date will be provided.</li> <li><i>Update:</i> The vendor is still working on a fix to the major defect. The project team is working with them and the integrator to facilitate a timely resolution.</li> </ul>	<ul style="list-style-type: none"> <li>Reduces network outage and data breach risks by adding the ability to provision or block access to network services, (email, internet, file shares, etc.), based on role and compliance with enterprise security standards, patch levels, etc.</li> <li>Reduces manual processes by adding capability to automatically grant guest access and dynamic user provisioning (conference rooms).</li> <li>Improves network resiliency by increasing CalPERS monitoring capability and creating more reliable endpoint enforcement capabilities.</li> </ul>
<p>Security Roadmap Program (SRP)</p>	<p>* Enterprise Identity System(s)</p>	<p>66%</p> <p>(On Target - Due: 3/31/15)</p>	<ul style="list-style-type: none"> <li>Redesign document completed.</li> </ul>	<ul style="list-style-type: none"> <li>Reduces risks by increasing security of informational assets for members, business partners, and internal staff.</li> <li>Consolidates system identity profiles to provide more robust, enterprise level access controls.</li> <li>Increases business process efficiencies for managing user access and privileges.</li> </ul>

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Security Roadmap Program (SRP)	* Data Loss Prevention (DLP)	25%  (On Target - Due: 6/30/15)	<ul style="list-style-type: none"> <li>• Deployed data detection technology looking for sensitive information to a test group of 40 staff members.</li> <li>• Completed project objectives and scope.</li> <li>• Drafted project charter.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduces the risk of inadvertent or malicious disclosure of sensitive information.</li> <li>• Reduces the risk of high-profile losses of Personally Identifiable Information (PII) and Personal Health-related Information (PHI).</li> <li>• Strengthens CalPERS protection of data by reducing the risk of sensitive data leaving the organization.</li> <li>• Reduces the risk of inadvertent or malicious disclosure of CalPERS sensitive information through the proper destruction of data stored on electronic media.</li> </ul>
Security Roadmap Program (SRP)	* Security Information and Event Management	6%  (Due: 6/30/15)	<ul style="list-style-type: none"> <li>• Drafted project charter.</li> <li>• Identified project team and secured resource commitments.</li> </ul>	<ul style="list-style-type: none"> <li>• Reduces risk of gaps in security information and events by documenting requirements and business practices.</li> <li>• Strengthens CalPERS regulatory compliance by selecting and architecting a product solution to meet regulatory requirements.</li> <li>• Develops architecture plan and integration approach strategy to maximize effectiveness and risk reduction for production security information and events.</li> </ul>
Business Intelligence (BI)  <i>Description: During the 2011-2012 Fiscal Year, CalPERS successfully executed a project that built an enterprise Business Intelligence program. The BI Program responds to daily, operational requests supporting CalPERS business. In addition, the 2013-2015 Business Plan contains</i>	End-to-End Business Intelligence  Owned by Retirement Research & Planning Division	5%  (On Target - Due: 6/30/15)	<ul style="list-style-type: none"> <li>• Supporting the implementation of BI governance.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhances end-to-end services through the use of business intelligence by enhancing enterprise research, innovation and organizational performance.</li> </ul>

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<i>three business objectives that are specifically leveraging BI and are part of Strategic Goal B – Cultivate a high performing, risk intelligent and innovative organization.</i>				
Business Intelligence (BI)	Service Delivery Transformation  Owned by Customer Service & Support	55%  (On Target - Due: 6/30/15)	<ul style="list-style-type: none"> <li>• Provided updated monthly consolidated responses, summaries and age distribution analysis of surveys to support the Full Voice of the Customer Satisfaction initiative.</li> <li>• Provided updated metrics regarding my CalPERS Member Self Service utilization.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhances business processes to achieve high-quality, timely, effective and efficient customer service delivery to members and employers.</li> </ul>
Business Intelligence (BI)	Measures & Cost-Effectiveness Measurement (CEM) Survey  Owned by Enterprise Strategy & Performance Division	87%  (On Target - Due 12/31/14)	<ul style="list-style-type: none"> <li>• Updated Strategic Measures Dashboard titles to the visual display based on updated metric language as a result of the July offsite Board workshop.</li> </ul>	<ul style="list-style-type: none"> <li>• Develops and implements strategic measures that utilize business intelligence tools.</li> <li>• Evaluates enterprise results and assesses effectiveness of the CalPERS 2012-2017 Strategic Plan.</li> <li>• Assists with the long-term strategic decision making and planning process.</li> </ul>

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