CHIEF INFORMATION OFFICER MATRIX
INFORMATION TECHNOLOGY SERVICES BRANCH
December 15, 2014

Board Assignment Status

Program Name	Project Name	%	Major Accomplishments (This Reporting Period)	Business Benefit
my|CalPERS *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.*	Accenture Knowledge Transfer (KT)	100%	• Completed 100% Accenture KT activities in September. • Closeout of Accenture contract responsibilities completed as planned on September 13.	• Ensures transfer of my|CalPERS expertise to State staff. • Improves ongoing operational service quality. • Allows future system enhancements to be made without reliance on the Accenture system integrator. • Increases subject matter expertise across all business functions.
my|CalPERS *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.*	Functional Optimization	95% Vendor Selection Phase	• A Functional Optimization (FO) Proof of Concept (POC) kicked off on October 27. This four-week effort will serve as a validation that the Finalist's approach meets CalPERS needs. The POC was completed on November 25. • Review of FO Initiatives is scheduled for the first week of December. • Contract negotiations with the Finalist vendor began on November 20. Contract finalization and execution are	• Establish a collaborative vendor partnership in order to deliver value in support of functional optimization initiatives for the my|CalPERS system and infrastructure environment. • Expedition and improvement of services to all CalPERS customers, internal and external. • Continuous progress, quality, and performance measurement of functional optimization activities against success goals.

*Technology projects that are in support of and/or mitigating "Top Risks" listed on the Enterprise Risk Management Committee (ERMC) dashboard

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			planned for mid -December.	
my|CalPERS *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&O activities, as well as all activities in support of the Functional Optimization project.*	Process and Tools Optimization (PTO)	95% (On Target – Due: 11/30/14)	• External experts conducted approximately 25 ITSB interviews and five program area interviews in late September and October to identify and assess current my|CalPERS Maintenance & Operations processes and tools. • Draft PTO Assessment and recommendations were completed on October 23 and were reviewed by the PTO Steering Committee in November. • Revisions are in progress- Review with the PTO Steering Committee is scheduled for early December. • Prioritization of high-value improvements are planned for December. • Scheduling of PTO enhancements is expected to begin in January.	• Improve quality of my|CalPERS changes and enhancements. • Improve productivity of my|CalPERS resources. • Improve utilization of tools for tracking progress and performance. • Increase communications across ITSB in support of M&O activities.

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Enterprise Content Management (ECM) *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.*	Inside CalPERS Content Transition	72% (On Target – Due: 12/31/15)	• Completed transition of the four divisions in phase 2.4 of transition: Financial Research & Accounting Division; Financial Planning, Policy & Budgeting Division; Executive Office; and Board of Administration. • Completed Content Evaluation, Style Guide, and Information Architecture training for the five divisions in phase 2.5: Operations Support Services, Office of Audit Affairs, Governmental Affairs, Stakeholder Relations, and Center for Innovation.	• Enhances consistency and quality of enterprise communication. • Improves operational efficiencies.
Enterprise Content Management (ECM)	Website Usability Initiative	75% (On Target – Due: 6/30/15)	• Completed the build, review and approval of two custom applications for Business Partner content. • Completed the content development of six topic areas and published on the Pilot site. • Completed all updates to Member Pilot updates based on internal CalPERS community feedback and quality assurance reviews. • Completed necessary wireframes for Business Partner content pages. • Completed Business Partner Content usability testing at the Employer Educational Forum.	• Improves customer experience/satisfaction with accessing CalPERS information. • Lowers operational costs by increasing percentage of customer self-service for informational requests. • Improves CalPERS Brand image.

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Disaster Resiliency *Description: Annually, the CalPERS Information Technology Services Branch updates the Technical Recovery Plan and conducts a Disaster Recovery Exercise to evaluate and improve our technical recovery readiness.*	Backup, Restoration, Archiving, and Disaster Recovery Services Request for Proposal (RFP) Technical Recovery Plan (TRP) Update	30% (On Target – Due 2/29/15) 18% (On Target – Due 1/15/15)	• The cross-functional team refreshed the critical applications list and is incorporating the data into requirements for the RFP. IT management is reviewing preliminary drafts. • The annual update of the TRP, and corresponding Group Plans, is underway. Enhancements and clarifications were implemented to improve plan development effectiveness.	• Minimize business disruption and downtime. • Minimize financial impact. • Vital Records and information assets preservation. • Improve recovery capabilities for all critical systems.
Security Roadmap Program (SRP) *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.*	* Network Access Control (NAC)	91% (Behind Schedule - Due: ~~6/30/14~~ 12/31/14)	• Completed configuration to test fix for the vendor product defect and began testing.	• 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. • Reduces manual processes by adding capability to automatically grant guest access and dynamic user provisioning (conference rooms). • Improves network resiliency by increasing CalPERS monitoring capability and creating more reliable endpoint enforcement capabilities.

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Security Roadmap Program (SRP)	* Enterprise Identity System(s)	73% (On Target - Due: 3/31/15)	• Completed requirements questionnaire and joint design sessions for "Requirements Specification" deliverable. • Created draft "Requirements Specification" Deliverable for final review. • Completed Deliverable Expectation Document for "To-Be Design", accepted by Sponsor.	• Reduces risks by increasing security of informational assets for members, business partners, and internal staff. • Consolidates system identity profiles to provide more robust, enterprise level access controls. • Increases business process efficiencies for managing user access and privileges.
Security Roadmap Program (SRP)	* Data Loss Prevention (DLP) – Phase 2	94% (Behind Schedule – Due: ~~6/30/14~~ 2/28/15)	• This is a FY 13/14 Project; Schedule delay hasn't impacted the project budget or scope. Once the policy is approved, ITSB will implement accordingly.	• Reduces the risk of inadvertent or malicious disclosure of sensitive information. • Reduces the risk of high-profile losses of Personally Identifiable Information (PII) and Personal Health-related Information (PHI). • Strengthens CalPERS protection of data by reducing the risk of sensitive data leaving the organization. • Reduces the risk of inadvertent or malicious disclosure of CalPERS sensitive information through the proper destruction of data stored on electronic media.

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Security Roadmap Program (SRP)	* Data Loss Prevention (DLP) – Phase 3	32% (On Target -Due: 6/30/15)	• Completed preliminary review of Electronic Media Destruction policy, process, and requirements. • Completed preliminary review of Data-at-Rest policy, processes, and requirements.	• Reduces the risk of inadvertent or malicious disclosure of sensitive information. • Reduces the risk of high-profile losses of Personally Identifiable Information (PII) and Personal Health-related Information (PHI). • Strengthens CalPERS protection of data by reducing the risk of sensitive data leaving the organization. • Reduces the risk of inadvertent or malicious disclosure of CalPERS sensitive information through the proper destruction of data stored on electronic media.
Security Roadmap Program (SRP)	* Security Information and Event Management	15% (Due: 6/30/15)	• Completed SIEM stakeholder outreach meeting. • Developed additional SIEM requirements.	• Reduces risk of gaps in security information and events by documenting requirements and business practices. • Strengthens CalPERS regulatory compliance by selecting and architecting a product solution to meet regulatory requirements. • Develops architecture plan and integration approach strategy to maximize effectiveness and risk reduction for production security information and events.
Business Intelligence (BI) *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*	End-to-End Business Intelligence Owned by Retirement Research & Planning Division	10% (On Target - Due: 6/30/15)	• In support of the implementation of Business Intelligence (BI) governance, Leads have begun to prioritize BI workload to support the organization.	• Enhances end-to-end services through the use of business intelligence by enhancing enterprise research, innovation and organizational performance.

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addition, the 2013-2015 Business Plan contains three business objectives that are specifically leveraging BI and are part of Strategic Goal B – Cultivate a high performing, risk intelligent and innovative organization.				
Business Intelligence (BI)	Service Delivery Transformation Owned by Customer Service & Support	55% (On Target -Due: 6/30/15)	• Provided updated monthly consolidated responses and summaries of surveys to support the Full Voice of the Customer Satisfaction initiative. • Provided updated metrics regarding my|CalPERS Member Self Service utilization.	• Enhances business processes to achieve high-quality, timely, effective and efficient customer service delivery to members and employers.
Business Intelligence (BI)	Measures & Cost-Effectiveness Measurement (CEM) Survey Owned by Enterprise Strategy & Performance Division (ESPD)	93% (On Target - Due 12/31/14)	• Developed dashboard prototypes of Media and Stakeholder Perception measures for External Affairs (EXAB) and ESPD. • Initiated development of a dashboard prototype of the Employer Turnover measure for Human Resources (HRSD).	• Develops and implements strategic measures that utilize business intelligence tools. • Evaluates enterprise results and assesses effectiveness of the CalPERS 2012-2017 Strategic Plan. • Assists with the long-term strategic decision making and planning process.

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