

# my|CalPERS Functional Optimization Update

## Finance and Administration Committee

Donna Lum, Deputy Executive Officer  
Liana Bailey-Crimmins, Chief Information Officer

Agenda Item 9c, Attachment 1  
November 17, 2015

# Agenda



Background



Optimization Approach



Business Benefits



Knowledge Transfer



# Background: 2014/15 Board Presentations

Optimize  
my|CalPERS

Knowledge  
Transfer

PIER Plus

*"The concerted effort by CalPERS IT staff and our vendor partner to understand the business needs and collaborate through all phases has been key to the success of the Functional Optimization project."*

—Shannon Taylor, Actuarial Office



## PIER Plus Recommendations



- **Implement Benefits Realization Management**
- **Balance Business Priorities**
- **Enhance Contract Vehicles and Procurement Approach**
- **Refine In-House Skills**
- **Execute Incremental Business Process Reengineering**

# Optimization Approach

Blended Teams & Knowledge Transfer

Technology Checkpoints

Lessons Learned

Agile Builds

Cross Organizational Partnerships





# Optimization Accomplishments



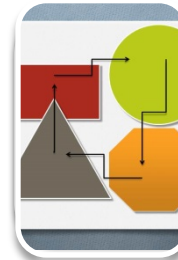
Member  
Summary Page



Returned Warrants



Health Plan Set-Up



Workflow Management



# Upcoming Optimization Initiatives



Interest Payments



Medicare Enrollment



Retirement  
Compensation Review



Online Health  
Statements



# Knowledge Transfer



Blended Teams



Individualized  
Training Plans



Library of  
Work Products

Enable State staff  
to deliver high-quality  
my|CalPERS services



# Recap and Next Steps



Continual Investments



Core Functionality Benefits



Expertise to Sustain the Promise