

Business Benefits Association -- Information Technology Group

Business and Technology Survey

11/23/2005

	Assemblies of God Ministers Benefit Association	Board of Pensions of the Presbyterian Church (USA)	Christian Brothers Services	Church of the Brethren Benefit Trust	Church Pension Group -- Episcopal Church (USA)	Evangelical Lutheran Church in America Board of Pensions	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & Affiliates)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
IT Leader:	Jim LaVallee	Ed Driscoll	Tom Drez	Nevin Dulabaum	Rev. Clayton Crawley	Steve Willems	Rick Hart	Bob Cushman	Bill Siener	Tom O'Neill	Nancy Lamoreaux	Sharon Maggi	Elliott Buchholz
Internet Domain:	agfsg.org	pensions.org	cbservices.org	brethren.org	cpg.org	elcabop.org	guidestone.org	wbp.org	mmbb.org	pbucc.org	nadadventist.org	gbophb.org	ymcaret.org
1A. Total # of DB Plan Participants?	None	39,908	25,700	-	Clergy Defined Benefit Plan: Active(7,231); Retired(9,050); Lay Defined Benefit Plan: Active(1,593)	NA	2,500	Concordia Retirement Plan 32,000 (DB)	NA	NA	15,000	Legacy Plan - 15,000	N/A
1B. Identify DB Plan Software for ADMINISTRATION/RECORD KEEPING by Name or "Custom-Developed"	None	PeopleSoft HRMS vers. 8.8	Aon BenefitsEdge Windows Application Server w/ Oracle Database Server	-	SBC Benefits Workstation (Clergy DB and Lay DB)	NA	Sungard OmniPlus	Lawson for administration & Benefit Connect (Internal System) and dbConnect for calculations from EDS	-	NA	Custom-Developed	PARK, custom developed for indicative and custom data elements; SunGard OmniPlus Recordkeeping	N/A
1C. Identify DB Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	None	Inhouse IBM p-series servers	Compaq	-	Outsourced at Mercer: SBC (Windows, Oracle)	NA	HP Intel servers	MS-Windows on Intel server platform	-	NA	MS-Windows	W2K web servers, HP L Class Unix, Oracle database; Recordkeeping Outsourced-SunGard ASP-HP UNIX	N/A
2A. Total # of DC Plan Participants?	20,712	8,500	4,400	4100	Lay Defined Contribution Plan: Active(5,426) Retired(63)	50,000	160,000	An old Pension Plan for Pastors and Teachers 300 (DC) - This will be rolled into our new Defined Contribution Plan 1/1/07	403(B) Plan:Active (5950)/ Retired (3195)	12,350 members in the accumulation phase and 8,700 members in the annuity phase	-	Clergy-25,700; Agency-1,000; Voluntary Lay-13,000; PIP Clergy and Lay-30,600; Safe Harbor 401K-300	75,500 total (47,000 active, 20,000 inactive, 8,500 retirees)
2B. Identify DC Plan Software for ADMINISTRATION/RECORD KEEPING by Name or "Custom-Developed"	Outsourced to McCready & Keene (Indianapolis)	Outsourced to Fidelity	Outsourced to Vanguard	Trust Service Company	Fidelity (Lay DC)	Outsourced (ACS Mellon) / Custom-Developed	Sungard OmniPlus	Met Life	TPA (Mellon Bank) and In-House (BICC System)	"Benefit Fund Administration System" developed by BICC Systems, Inc. of Chicago, IL.	Custom-Developed and UALIC	PARK Custom developed for indicative and custom data elements; SunGard OmniPlus Recordkeeping	Custom-Developed
2C. Identify DC Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	Outsourced; Call Center uses AS-400	Outsourced to Fidelity	Outsourced to Vanguard	AS/400	Outsourced; Fidelity (Mainframe, Websphere)	ACS - Mellon / AS400 (internal)	HP Intel servers	Met Life	TPA (Mainframe)/ In-House (i Series)	IBM iSeries (Eserver i5)	MS-Windows	W2K web servers, HP L Class Unix, Oracle database; Recordkeeping Outsourced-SunGard ASP-HP UNIX	Compaq Servers, Windows 2000, Windows XP, MS SQL Server
3A. Total # of UDC Plan Participants?	885	n/a	n/a	-	-	NA	2500	Initial enrollment currently underway	NA	NA	-	None	N/A
3B. Identify UDC Plan Software for ADMINISTRATION/RECORD KEEPING by Name or "Custom-Developed"	outsourced to McCready & Keene (Indianapolis)	n/a	n/a	-	-	NA	Sungard OmniPlus	Met Life	-	NA	-	N/A	N/A
3C. Identify UDC Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	Outsourced; Call Center uses AS-400	n/a	n/a	-	-	NA	HP Intel servers	unknown	-	NA	-	N/A	N/A

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4A. Total # of HEALTH Plan Covered Lives (Participants & Families)?	None	54,800	18,000	1400	8,492 Active; 6,830 Retirees (Households)	-	27,000	Concordia Health Plan with 20,000 Active Mbrs; 4,500 retirees; 50,000 total lives	TPA (Benefit Planners): Active (CIGNA 2500)/ Retired (Hartford 2050)	12,100 participants	-	25,000 to 30,000	N/A
4B. Identify Health Plan ELIGIBILITY SOFTWARE by Name or "Custom-Developed"	Not Applicable	PeopleSoft HRMS vers. 8.8	BSSI Premium Plus	FACTS Services	FiServ ID3	Custom-Developed	MDI's FIMMAS	Lawson for administration.	TPA	"Benefit Fund Administration System" developed by BICC Systems, Inc. of Chicago, IL	Custom-Developed & Adventist Risk Mgmt.	Watson Wyatt semi-custom developed, WebMD for HRA administration and inquiry.	N/A
4C. Identify Health Plan CLAIMS SOFTWARE by Name or "Custom-Developed"	Not Applicable	Outsourced to Highmark BCBS	Principal Financial Group CS3	Outsourced to MMA	FiServ ID3 - Claims are external to ID3 and are handled by the carriers	Outsourced	Outsourced	Blue Cross/Blue Shield handle claims.	Active (CIGNA)/ Retired (Hartford)	Currently outsourcing to Highmark Benefits Systems. Will be outsourcing to Highmark effective 1/1/2005.	Outsourced	Claims are administered by carriers	N/A
4D. Identify Health Plan ELIGIBILITY HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	IBM iSeries (fka AS/400)	Dell 2400 WinNT Pick-D3	Outsourced; FiServ (AS/400)	Wintel	HP Intel servers	MS-Windows on Intel server platform	TPA	IBM iSeries	MS-Windows	Outsourced- Watson Wyatt- Windows servers- SQL database	N/A
4E. Identify Health Plan CLAIMS HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Outsourced to Highmark BCBS	Principal's IBM Mainframe	Outsourced to MMA	Outsourced; FiServ (AS/400) - Claims are external and are handled by carriers	Outsourced - Aetna, BCBS	Outsourced Highmark & Principal	Outsourced (BC/BS, Express Scripts, Delta Dental)	Active (CIGNA)/ Retired (Hartford)	Currently outsourcing to Highmark Benefits Systems. Will be outsourcing to Highmark effective 1/1/2005.	Outsourced	Outsourced- BCBSIL, UHC, Medco, Cigna Dental, VSP, UBH	N/A
5A. Identify Disability Plans and # of Participants in Each	Not Applicable	One disability plan with optional disability coverage. Disability medical review is outsourced to Broadspire. 300 currently on disability.	LTD (17,000)	LTD 712	Fully-Insured Short Term "Lay" Plan (2,404); Self-Insured Short-Term "Clergy" Plan (6,329); Voluntary Long-Term Plan (1011); Non-Contributory Long Term Plan (760); LTD Diocese of Massachusetts	1 Plan - "regular", 13,882	34,000 participants	Concordia Disability and Survivor Plan (32,000 mbrs)	1 Plan (5960 Participants)	The Life Insurance and Disability Plan provides benefits to 5,800 members.	-	Clergy 21,300; Lay 6,000	N/A
5B. Identify Disability Plan ELIGIBILITY SOFTWARE by Name or "Custom-Developed"	Not Applicable	PeopleSoft HRMS vers. 8.8	BSSI Premium Plus	Same as ELIGIBILITY 4B	UNUM	Custom-Developed	MDI's FIMMAS	Lawson for administration.	TPA (Mellon Bank) and In-House (BICC System)	"Benefit Fund Administration System" developed by BICC Systems, Inc. of Chicago, IL.	-	PARK custom developed indicative and custom data elements; billing Custom legacy application for Lay Omniplus for Clergy	N/A
5C. Identify Disability Plan BENEFIT PAYMENT SOFTWARE by Name or "Custom-Developed"	Not Applicable	PeopleSoft HRMS vers. 8.8	Principal Financial Group CS3	Same as ELIGIBILITY 4B	UNUM	Custom-Developed	Outsourced	Lawson for administration.	TPA (Mellon Bank) and In-House (BICC System)	Benefits are paid by Metropolitan Life Insurance Co.	-	Migrated to SunGard's OmniAnnuity	N/A
5D. Identify Disability Plan ELIGIBILITY HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	IBM iSeries (fka AS/400)	Same as health 4D	Outsourced; UNUM	AS/400	MDI's FIMMAS	MS-Windows on Intel server platform	TPA (Mainframe)/ In-House (i Series)	IBM iSeries	-	W2K web servers, HP L Class Unix, Oracle database; and Outsourced- SunGard ASP-HP UNIX	N/A

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5E. Identify Disability Plan BENEFIT PAYMENT HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	Principal's IBM Mainframe	Same as ELIGIBILITY 4B	Outsourced: UNUM	Custom-Developed	Outsourced UUNAM	MS-Windows on Intel server platform	TPA (Mainframe)/In-House (i Series)	Outsourced to Metropolitan Life		HP UNIX with SunGard ASP	N/A
6A. Identify Any OTHER Plans (e.g. P/C, Dental, Mental Health, etc.) and # of Participants in Each	Not Applicable	Dental - Aetna (6,084); Optional Death (6,225); Prescriptions-Express Scripts (25,061 mbrs & 55,135 lives); Mental Health-Cigna Behavioral Health (15,661 mbrs & 54,800 lives)	Property / Casualty	Dental, Vision, Flexible spending accounts, LTC	Dental 7,216; Prescription 14,371; Vision 12,973; MHSA 5,446	Survivor Benefits (36,529), Delta Dental (40,475), Value Options (29,265), Express Scripts (41,300)	Dental, P/C, Life, Long Term Care	Dental=Delta Dental (20,000 mbrs; 44,000 lives)	Dental PPO (CIGNA)	The Dental Plan provides benefits to 9,900 members. The Mental Health Plan serves 8,150 participants.		Dental and Behavioral Health are bundled with health	N/A
6B. Identify OTHER Plans SOFTWARE by Name or "Custom-Developed"	Jack Henry 20/20	Outsourced	CSC Point System	Same as ELIGIBILITY 4B	FiServ ID3	Custom-Developed		Lawson for administration.	TPA	Eligibility for both the Dental Plan and the Mental Health Plan is tracked by the BICC system. Harrington Benefits currently processes Dental claims. These claims will be processed by United Concordia effective 1/1/2005. Mental Health claims are processed by	Outsourced	Same as Health	N/A
6C. Identify OTHER Plans HARDWARE Platform; If Out-Sourced, Name Vendor	Financial Edge Black Baud 7	Dental-Aetna; Mental Health-Cigna Behavioral Health	IBM iSeries (fka AS/400)	Same as health 4D	Outsourced: FiServ (AS/400)	AS400		MS-Windows on Intel server platform		Eligibility is handled by an IBM AS400. Claims are outsourced.		Same as Health	N/A
7A. Do You Have a Customer Relationship Management (CRM) or Similar Strategy/Plan? If So, Please Briefly Describe	We have 5 to 8 FTE Retirement Planning Specialists working on a Cisco 7960 Voice over IP system. We have a Spanish language "split" and also use a Tapi-link to get "screen pops" whenever a caller's ANI matches a number in our Goldmine Customer Database. We are currently converting all of our data to Salesforce.com and expect to be	CRM system is integrated with the PeopleSoft HRMS system and is used to document and track all member interactions that occur on the telephone, via fax, or email.	Yes; To provide a high level view of all organizations & people associated with all plans and programs; to track and utilize org & people preferences for information delivery	ACT	Yes, Avaya/Oracle combination for call center. Oracle for CRM/Marketing. Implementation for Call Center Q2 2006; CRM/Marketing Q4 2006	BOP is the first point of contact for members & sponsors when they think about their retirement, health, or disability needs.	Yes, custom developed	No	Yes, Call Center (Lotus Notes-based) supports Member Services contacts w/ Members & Employers	Our CRM system is a custom-designed workflow that is tightly integrated with our Document Imaging System (Legato). Correspondence, emails, faxes, and telephone calls are logged into the system. If the item warrants a response it is assigned to a customer service representative, and is tracked to completion. All items are monitored against pre-determined	No	We are currently using a custom contact management application with rudimentary workflow. We are evaluating an automated workflow solution to replace this application.	No formal CRM, but using Call Center Software integrated into IP Telephony system, plus some custom developed software

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7B. Identify CRM Software by Name or "Custom-Developed"	Custom Developed	Charter CRM - MS Windows/SQL based system	Custom-developed in Lotus Domino/Notes	We use many common ACT plugins to extend ACT's functionality	Oracle eSuite CRM	Pivotal	Custom developed		Custom Developed (Lotus Notes)	Custom-Developed		Custom developed	Call Center Software - ShoreTel; Call Tracking - Custom Developed
7C. Identify CRM Hardware Platform; If Out-Sourced, Name Vendor	Not Applicable	IBM NT server running MS SQL database	IBM iSeries (fka AS/400)	Linux file server running Samba emulating Active Directory	Outsourced; Oracle OnDemand	Wintel	HP Intel servers		Windows 2003	2 Dell Servers running Windows 2000 and a Plasmon Optical Jukebox		HP UNIX, Oracle database, Access code	Windows 2000 Server, MS SQL Server
8. List Major Business Initiatives Underway and/or Planned For The Next 12 Months	Consolidation of our existing (8) databases so as to reduce down to a functional three.	Implementing new Medicare Part D for prescription drugs; Completed Asset/Liability study to evaluate pension plan assumptions and strategy; Funds development and support of new assistance programs; Service delivery improvements / enhancements, including Internet-based member service and workflow automation.	CRM, BCP, website self-service features / functions, document scanning; Anything, Anyone, Anywhere, Anytime	Develop additional lending and online credit union services / Moving to HSA's in 2006 / Upgrade pension online reporting / Develop user interface for eligibility reporting / Review credit union and insurance database vendors	BCP, CRM, ECM, Infrastructure, Project Management Standards		Expanded market initiatives		Redesigned Retirement Module; Generic Retirement Plans; 403(b) Roth IRA; Outsource State Tax Withholding; ACT2005	Enhanced BCP, additional rollouts to our corporate website, migration of Health claim processing to Highmark, expansion of Document Imaging capabilities throughout the organization, possible introduction of a newly designed consolidated annuity choice		1.Migrated from the Legacy Benefit Payment System to SunGuard's OmniAnnuity and OmniDBEN in an ASP environment. 2.Implement a Benefits Portal servicing Plan Administrators providing single point of access to Pension and Health & Welfare services 3.Implementation of a new Health & Welfare administration system (Vitech-V3) providing greater depth of service for participants 4.Implementation of a new plan administration facility for Plan Sponsors providing improved plan management tools 5.Implementation of a benefits data warehouse providing improved informational reporting and analytics 6.Evaluating	Enhancing new technology to optimize Customer Service efficiency

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9. Is Your Organization Planning Any Major Technology Infrastructure Changes/Improvements Within the Next 5 Years? If so, Please Briefly Describe Them.	Linux or possibly Unix otherwise we will need to upgrade our AS400.	Completed major upgrade to document management / imaging capability and migrated all images from optical to magnetic storage media. Implementing RSA web security as secure Internet infrastructure supporting member self-service initiatives. Implementing Stellect ECM in support of strategic workflow automation initiative. Implementing IBM blade server capability and establishing a new server upgrade / replacement process. Implement batch process automation and remote operations support.	Implement Avaya IP-PBX; Extreme Networks infrastructure	New tape library system / Active Sync with Cell phones / Possibly replacing both health database and Credit union with different vendors / moving all PC network to gigabit /	Hot Site at company-owned remote location; new server room at HQ	Migration to Windows XP and desktop refresh in 2006, Reducing server infrastructure by using VMWare	Redefine Web strategy, Wireless, Revamp disaster recovery philosophy	Implemented Inter-Tel call center solution	SSL VPN Gateway; Upgrade to Blade Servers; IP-based Videoconferencing ; VOIP upgrade to Nortel PBX system	Our major initiative will be to establish global access to ALL of our applications.		Implementation of a unified SOA architecture using Microsoft's Sharepoint, Biztalk and SSO services providing the long-term foundation to support business evolution and responsiveness.	Recently completed major infrastructure upgrades; no current plans for additional changes
10. Has Your Organization Articulated a Technology Infrastructure Strategy, Formally or Informally? If YES, Please Briefly Describe It.	No	Yes. 5-year IT strategy was developed in 2001 and updated in 2004. A new 5-year IT strategy will be developed in 2006 and will serve as the blueprint for all major IT investments.	Yes; IBM iSeries Platform; Wintel Platform for specialized servers and desktops / laptops	Yes. Our goal is to maintain the reliability and integrity of our systems while offering useful tools to users and customers. 3-year rotation of mission critical hardware. Implementation of Disaster Prevention and Recovery Plan.	Yes, formal Outsourcing primary transactional systems. In house infrastructure to open source technology	Functional disassembly of legacy systems. Browser based application development. Microsoft .Net development environment. Bias to purchased application vs. building applications. Alignment of IS strategy with business strategy.	Yes, Containment strategy with legacy platforms/systems, total migration to Windows Intel platform	Strategy to build a solid foundation in order to support an ever aggressive business strategy. Focused on 3-year plans.	Yes, IP Nortel layer 3 Switching; Nortel SSL & IP-SEC VPN (FTP processing to TPAs); Netscreen Firewalls w/ automated failovers, both in the MMBB LAN/WAN and Web hosting services. Windows/ iSeries Servers. Supporting remote	Yes; IBM AS400 supports core membership system; all additional systems based on Windows OS servers; VPN and firewall by Sonicwall; offsite website hosting		Buy versus build, maintain upgrade cycles, promote self service tools, create partnerships internal and external vendors, maintain secure computing environment, protect business with proven DRP.	Our current Strategic Plan (3-year) highlights critical technology improvements planned to improve the level of service we provide to our constituents, as well as to improve maintainability of systems

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11. Does Your Organization Use Benchmarks and/or Metrics to Measure IT Performance? If YES, Please Provide Examples.	No	Yes. BOP tracks and reports monthly on key financial, healthcare, and operational metrics that measure results against IT commitments.	To some extent; As its own business unit with financial statements, many metrics to measure IT usage with a chargeback system; always searching for IT performance measurement tools and metrics	No. We have systems to monitor uptime, and monthly external audits for security	SLA's with outsourced vendors; 2006 main goal SLA monitoring in-house; Gartner Benchmarking Service in 2006	Uptime metrics of business critical applications reported monthly.	Yes, internally developed service level agreements. Periodic peer metrics comparison by Gartner Consulting	Yes, but limited (server availability, Help Desk Calls, etc.)	Yes, LAN/WAN performance: Netscreen (Intrusion Protection). IT performance: Member Survey/Staff Survey	Yes; all contact from members (correspondence, telephone calls, email, and faxes) that requires a response is tracked to completion by pre-determined metrics. Help desk software (Revelation) tracks ongoing system requests/problems	-	System availability, internal and external audits, Help Desk stats using Track It. Beginning to measure application fit and total cost of ownership.	We track system down-time, Help Desk statistics (both internal and external), website usage, phone usage and email usage
12. Does Your Organization Have an IT Governance Strategy in Place? If YES, Please Describe	No	Yes. The BOP has an IT Steering Committee comprised of the CEO, COO, CIO, and other senior managers that provides input to IT strategy development and plans and ensures continuous alignment of IT priorities with strategic business plans. It approves and prioritizes business-requested plans and IT projects.	Yes; top-down approach with project steering committees, as necessary	no	Currently, an oversight committee for review as well as an executive committee for all major projects (including technology projects)	Technology Architecture Steering Committee, Security Committee, and Project Office in place.	Yes, I.T.O.L.	Yes - System Steering Committee comprised of one member from each business unit.	Yes, Member of Management Team, which approved MMBE 2006 Business Plan, including P&L Budget and Capital Budget financial targets	IT initiatives are planned and reviewed by senior management during regularly scheduled Management Meetings.	-	Yes. 1. IT Governance Board meets quarterly to review IT initiatives and operations. They approve strategic and tactical directives for IT execution. 2. IT leadership team proposes and executes on IT Governance Board directives as well as defines the IT architecture and infrastructure strategy and execution model and direct COBIT improvement initiatives 3.IT recommends Maintenance and Upgrade projects during the budget process. 4. Organizational initiatives in the business plan get the highest priority. Application changes/enhancements are prioritized by the business owners.	Organization has an Executive Management Team that oversees approval of major technology initiatives.

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13A. What is Your Organization's Annual IT Cost as a Percentage of the Organization's Annual Operating Budget? (include traditional IT-operations, development and services; exclude capital expenditures)	Less than 10%	14%	13.80%	7%	For 2005: \$8.5MM (12%)	12%	15 - 20 %	27%	\$1.77MM (11.7%)	The overall cost of technology across the organization is approximately 13.5 percent of the Organizations Annual Operating Budget.	-	20%	IT operating budget is 10% of entire organization budget. If compared to operating buget only (excluding Investments), 18% of budget.
13B. How Many IT Full-Time Equivalents (employees only) Do You Have On Staff To Support the Content of Question 13A?	About one	26	17	1	45 FTE: Administrative (5); Information & Data Support (12); Internet Strategy and Operations (8); Oracle Applications (6); Technology Support (7); Infrastructure (7)	24	75	5	F/T Employees 7	3 full-time employees	-	35 budgeted headcount	17
13C. How Many IT Full-Time Equivalents (contractors and consultants only) Do You Have "On Staff" To Support the Content of Question 13A?	About 1 1/2	0	0	0	No FTE contractors or consultants	2	0	10	F/T Consultants 1	5 consultants	0	2 to 4	1
13D. How Many Total Full-Time Equivalent (employees only) in Your Organization?	25 in Retirement Services	203	176	21.5	349	200	200	90	F/T 75	92 employees	-	260	85
14. Does Your Department or Do You Oversee/Perform Non-Traditional IT Functions? IF YES, Please Briefly Describe	No	Yes. IT provides oversight to all security functions	Yes; Graphic Arts and Communications	-	Yes; business partner on all new initiatives for lines of business (LOBs). Project management through ITS business analysts	Telecommunications	Yes, Non IT functions include retirement operations, insurance operations, records retention	-	N/A	Yes; IT has responsibility for telephone system operations. Two years ago this was not the case.	Yes	Enterprise Project Management Office-15 budgeted headcount.	Telecommunications, purchasing, power and supplemental a/c support
15. List WEB SERVER Hardware Platform and Software Installed; If Out-Sourced, Name Vendor and Describe Hardware, Software, and Services	Outsourced at several levels	Web hosting is outsourced to ATX. Intel Pentium 4 running Windows 2003 server.	Lotus Domino/Notes software running on Compaq hardware	Compaq DL380's running RedHat Apache	Apache on Solaris. CMS using MacroMedia Coldfusion	Internet outsourced to Onvoy, Intranet on Wintel	HP Windows Server 2003	IBM xSeries server running Microsoft IIS	Outsourced (VERIO Web hosting); MMBB web site (LINUX); Intranet site (Windows 2003)	Outsourced to New Village Media utilizing a Dell Poweredge Server running Windows Server 2003	-	HP DL360, ML530, WinXP 2003	Microsoft IIS (Windows 2000), MS SQL Server, Visual Studio
16. List DOCUMENT MANAGEMENT Hardware Platform and Software Installed; If Out-Sourced, Name Vendor and Describe Hardware, Software, and Services	Imaggio (formerly Files On The Net); over 1.1 million images. We are actively seeking a new vendor and expect to implement a change in early 2006.	EMC Centera running Stellent ECM document management solution	Custom-developed Lotus Domino/Notes applications running on IBM iSeries	none	Interwoven with offsite hosting	NA	Outsourced to ACS	FileNet with Pinnacle front end from KnowledgeLake	Hyland Software (ON BASE); MS-SQL/ Windows 2003	Docs Open document management system running on a Dell server. This system works alongside our Legato Imaging System which also runs on a Dell	-	Comsquared Unisearch, Sun/Unix platform HP 700 MX Optical Library, 9.1 GIG optical disks	Vignette (formally Tower), Windows 2000, MS SQL Server, HP Jukebox

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17. List DESKTOP Hardware Platform and Software Operating System(s) Installed	Dell & MS Windows XP (2004 w/ 3 year plan to swap out)	HP/Compaq running MS Windows 2000. Planning upgrade to MS Windows XP	IBM/HP's running Win2000 Pro/Win XP Pro	Dell Optiplex running XP sp2	Windows (COMPAQ and SONY) and Apple	Compaq, Windows 2000	Dell desktop Windows XP	Micron PC's using MS-XP	Dell PIII 2.2 GHZ w/ Windows XP	Dell Optiplex Desktops running Windows 2000/XP Professional	Dell Windows XP	Dell 1.7GHZ to 3.4GHZ, 512mb-1.5mb RAM, WinXP Pro	Dell desktops, Windows XP
18. List LAPTOP Hardware Platform and Software Operating System(s) Installed	Dell & MS Windows XP (2004 w/ 3 year plan to swap out)	IBM ThinkPad running MS Windows 2000	IBM's running Win 2000 Pro/Win XP Pro	Dell Latitude and Precision running XP sp2	Windows (TOSHIBA & Fujitsu) and Apple	Compaq, Windows 2000	Dell laptops Windows XP	IBM x31 x41 using MS-XP	Toshiba 4000 PIII 900 MHZ w/ Windows XP	Dell Latitude Notebooks running Windows 2000/XP Professional	Dell Toshiba Windows XP	Dell laptops, same configuration as above.	IBM, Fujitsu and Sony, Windows XP
19. List PDA Hardware Platform and Software Operating System(s)	Not Applicable	BlackBerry	Treo600/650's running Palm OS	Palm Treo 650's	Treo, Blackberry using GoodLink	Palm, Windows Pocket PC	Palm	Palm OS	Palm Tungsten/Palm Treo (Mergic VPN/ m Notes)	N/A	Palm Windows CE	No standard. Evaluating Smart phones and Microsoft Mobile	HP iPaq (Pocket PC)
20. List MASS STORAGE System(s) Installed, if Any	---	IBM FastT600	Xiotech SAN (2.4TB)	Linux Samba Built in-house 700gig raid	Apple Xserve G5 RAID on Solaris 10 SAN controller	EMC DMX / Symmetrix	HP SAN	IBM FastT600 with 5 terabytes	N/A	IT will be researching this in 2005.	n/a	EMC SAN Clarion 4700 and CX400	EMC Clarion CX400 SAN
21. List EMAIL or GROUPWARE Hardware Platform and Software Installed; If Out-Sourced, Name Vendor	Microsoft Outlook Office	MS Exchange and Outlook	Lotus Domino/Notes running on IBM iSeries	MS Exchange 2003 / Outlook 2003	Microsoft Exchange (currently evaluating replacement in 2006)	Microsoft Exchange	Microsoft Exchange/Outlook	Microsoft Exchange	Lotus Notes 6.5/ Windows 2003	Microsoft Exchange Server 2003 and Outlook running on Dell Poweredge Servers	Groupwise	Outlook 2000/Exchange 2000 currently upgrading to the 2003 versions to be completed by 12/31/2005	Microsoft Exchange and Outlook 2003; Also use Goodlink via Rim devices and Windows Mobile devices for remote email
22A. List TELECOM Carrier(s) and TRUNK CAPACITY	Nu Vox 3 T-1 Spans	ATX - 3 local T1s and 2 Long Distance T1s - 700 DIDs	AT&T; 3 T1 lines with 20 backup trunks	SBC 30 pots lines / 3 800 aliases	2 AT&T T1's @ 23 lines each (46 lines). 3 Verizon T1's @ 23 lines each (69 lines). 15 Verizon POTS lines	Qwest, 5 PRI T1's, 115 lines	MCI multiple T-1's	MCI - Shared Trunk Capacity	Voice (MCI 3.0 mbps)/ Data (MCI 4.5 mbps/ InterChurch Center 4.5 mbps)	AT&Tsupplies 2 full voice T1s	-	SBC Local carrier, AT&T long distance/800, 4 T1 ISDN lines, 10 voice trunks	MCI and Verizon (over 2 T1s)
22B. List PBX Platform Installed; If Out-Sourced, Name Platform and Vendor	Cisco Voice Over IP w/ Virtual Private Network	Nortel	Fujitsu F9600	Avaya Merlyn Legend	Avaya VOIP Switch	Interactive Intelligence CIC	Avaya	Inter-Tel	Nortel 11 C	The PBX is an Avaya/Lucent Merlin Magix 4424LD	-	AVAYA 8700 - ACM V 2.2, IP enabled	Shoretel VoIP
23. List INTERNET Carrier(s) and TRUNK CAPACITY	---	ATX over T1	AT&T; 1.5 T1 lines	DLS (SBC) Dual T1's loadbalanced per packet 3Mb	2 Redundant fractional T3's (AT&T and Verizon)	AT&T, 3MB bandwidth	UUNET T-3	Cogent with 1-T1	Primary (MCI 4.5 mbps)/ Backup (TIC 4.5 mbps)	XO Communications supplies 2 full data T1s	-	SBC & Novacon, 3 T1s, fully redundant, load balancing	MCI (1 T1 and 1 Shadow T1)
24A. Does Your Organization Have a Written Business Continuity Plan and/or IT Disaster Recovery Plan?	No	Yes to both	In process of writing most fully comprehensive plan	Yes, we have our Disaster Prevention and Recovery Plan while we are still working on a Business Continuity Plan	Yes. To be revised across enterprise in 2005/2006. IT DR testing in Q2 2006	Yes	Yes	Written and Tested DR Plan	Yes, Business Continuity Plan	The Disaster Recovery Plan is written while the Business Continuity Plan is in the process of being written. Both Plans will always be a work-in-progress	In-Process	Yes, we have both and test each one every year	Yes
24B. Does Your Organization Contract for Hotsite, Coldsite, or Colocation Arrangements? IF YES, Name Vendor and Describe	No	SunGard in Philadelphia provides full disaster recovery services	No; planning to use other CB organization's sites	No	Currently creating hotsite at company owned remote location. Completed Q4 2005 & Q1 2006	Sungard, linked via EMC SRDF tools	Yes currently, Rentsys	SunGard facilities in Scottsdale for servers and local facility for workstations.	MMBB Hot Site(VF): FTP w/ high availability;remote journaling	Not as of yet. We are planning to develop an alternate site that benefits both the Pension Boards and the UCC headquarters which is based in Cleveland	Being Developed	Cold site, SunGard Recovery Services	Coldsite with Sungard; also maintain remote Data Center for critical applications at MCI

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	Assemblies of God Ministers Benefit Association	Board of Pensions of the Presbyterian Church (USA)	Christian Brothers Services	Church of the Brethren Benefit Trust	Church Pension Group -- Episcopal Church (USA)	Evangelical Lutheran Church in America Board of Pensions	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & Affiliates)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
25. List WIRELESS LAN System(s) Installed, if Any	Not Applicable	None	Yes; Linksys 802.11b/g	Yes both b and g in our work space and all building meeting rooms for Internet only. From there we access network through VPN	Cisco Wireless LAN	NA	minor use of Linksys access points	None	Nortel WI-FI	3Com Wireless Access Point - Model 7250	Linksys	CISCO	Compaq Wireless, Internet access only with WEP security
26. Is Your Organization Considering the Use of LINUX? If YES, Describe	Possibly. We have noted that the industry is migrating away from AS-400. Also, we are attracted to Web Services and Security.	No	Yes; hardened versions of Linux for specialty apps	Yes, all web services and file servers run Linux.	Yes, primary root level infrastructure on Linux with Redhat and VMWare; Solaris for web servers; Microsoft Exchange; some pure Windows servers still exist	Yes, security appliances	NO	Not high priority	Yes, MMBB web hosted site/ AS/400 remote access	Our phone system (voice mail, call accounting, etc.) runs on a Linux Server. No additional plans for Linux are in the works.	Yes	Yes, we are early in the evaluation process	Security appliances only; not for servers or desktops
27. Please Describe Your Organization's Security Strategy	We work with all of our vendors to integrate encryption techniques and firewall disciplines. This year we are planning to have an outside firm attempt intrusion and other aspects of a comprehensive security audit.	An information protection strategy that is focused on protecting the BOP's physical and information assets, safeguarding IT systems & data, ensuring compliance with HIPAA & external audits. Components include securing the IT infrastructure including software and data access; establishing policy, procedures, & support; and providing ongoing security monitoring and reporting.	CIO is also CSO and CPO; Information Protection Strategy is to strike a balance between information access to employees, customer service, and compliance with applicable laws	Monthly security audit by consultant; twice annual intrusion audit by third-party firm. Radius server ties security throughout networks. Proposing tougher security policies regarding passwords for database logins. Using encryption and IPSec for remote logins.	Multiple login and Unix server security. Moving to LDAP in 2006. Policies to be revised with General Counsel and Internal Audit in 2006. Currently evaluating Tivoli Oracle ID as single signon solution for deployment in 2006	All data is confidential. We are a trusted repository of member and sponsor data. We have multiple layers of security.	- Completed outside System Audit, working on formalized procedures, outsourced network security and monitoring to Solutionary 24x7	LAN/WAN: Nortel SSL & IP-SEC VPN (DES-3 level) w/ Netscreen Firewalls; Intranet site: Verisign SSL	Our CSO is also the Vice President of the Pension Boards. We are utilizing Sonicwall Firewalls that are supplemented with several layers of security tools. Output from these tools is closely monitored.	- Antivirus, intrusion detection, vulnerability scanning, group and local policies, spyware, pest control	Security managed by IT Department; Technical Services staff act as security administrators. Documented procedures for data and systems security. Organization has an internal auditor who reviews security, and security audit conducted by external auditors ever few years		