

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC & AMBC	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	Richard Morton	Rick Hart	Bob Cushman		Tom O'Neill	Nancy Lamoreaux	Eileen Kane	Elliott Buchholz
Internet Domain:	agfsg.org	pensions.org	cbsservices.org	brethren.org	cpg.org	elcabop.org	fmfoundation.org	guidestone.org	wbp.org	mmbb.org	pbucc.org	nadadventist.org/ret	gbophb.org	ymcare.org
Date Last Updated:			11/17/2006											
1A. Total # of DB Plan Participants?	None	39,570	25,700		Lay DB active participants: 1,557; Clergy DB active participants: 7,551	NA	a	2,500	Concordia Retirement Plan 32,000 (DB)	N/A	N/A	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	b	Sungard OmniPlus	Lawson for administration & Benefit Connect (Internal System) and dbConnect for calculations from EDS		N/A	Custom-Developed	PARK, custom developed for indicative and custom data elements; SunGard OmniPlus Recordkeeping System	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	c	HP Intel servers	MS-Windows on Intel server platform		N/A	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	9,214	4,400	4100	Lay DC active participants: 5,328;	50,000	d	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)	12,480 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 System	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		N/A	NA		2500	Initial enrollment currently underway	N/A	N/A		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		N/A	NA		Sungard OmniPlus	Met Life		N/A		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		N/A	NA		HP Intel servers	unknown		N/A		N/A	N/A

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & ...)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
4A. Total # of HEALTH Plan Covered Lives (Participants & Families)?	None	53,406	18,000	1400	17,055 Active employees and dependants; 8,021 Retirees and dependants	-	-	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)	11,085 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	-	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.	-	BICC Software administers eligibility which is passed on a weekly basis to Highmark Benefits Systems.	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)	Outsourced to MMA	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)	Outsourced to Highmark Benefits Systems.	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: 2,296; Self-Insured Short-Term "Clergy" Plan: 6,329; Voluntary Long-Term Plan: 867; Non-Contributory Long Term Plan: 798; LTD Diocese of Massachusetts: 259	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 3311 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	Outsourced to MMA	UNUM	Custom-Developed	-	MDI's FIMMAS	Lawson for administration.	TPA (Mellon Bank) and In-House (BICC System)	"Benefit Fund Administration System" - BICC Systems	-	PARK custom developed indicative and custom data elements; billing Custom legacy application for Lay Omnipus 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	Outsourced to MMA	UNUM	Custom-Developed	-	Outsourced	Lawson for administration.	TPA (Mellon Bank) and In-House (BICC System)	TPA - 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)	Outsourced to MMA	Outsourced: UNUM	AS400	-	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

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & CMAA)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
5E. Identify Disability Plan BENEFIT PAYMENT HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	Principal's IBM Mainframe	Outsourced to MMA	Outsourced: UNUM	Custom-Developed	-	Outsourced UUNAM	MS-Windows on Intel server platform	TPA (Mainframe)/ In House (i Series)	TPA - 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 (6,085 mbrs & 13,934 lives); Optional Death (3,907 mbrs & 6,006 lives); Prescriptions- Express Scripts (24,396 mbrs & 53,389 lives); Mental Health-Cigna Behavioral Health (17,903 mbrs & 43,048 lives)	Property / Casualty	Dental, Vision, Flexible spending accounts, LTC	Dental: 7,385 households; Prescription: 16,208 households; Vision: 16,301 households; MHSA: 5,262 households	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 9,675 members. The Mental Health Plan serves 8,150 participants. We have also established a Flexible Spending Plan.	-	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	Outsourced to MMA	FiServ ID3	Custom-Developed	-	-	Lawson for administration.	TPA	Eligibility for the Dental Plan and the Mental Health Plan and the Flexible Spending Plan is tracked by the BICC system. United Concordia processes out Dental claims.	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)	Outsourced to MMA	Outsourced: FiServ (AS/400)	AS400	-	-	MS-Windows on Intel server platform	-	Eligibility is handled by IBM iSeries. 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 operational by Dec. 17, 2005.	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. CRM/Marketing Q4 2007	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 integrated with our Document Imaging System (EMC's WebXtender). Correspondence, emails, faxes, and telephone calls are logged into the system.	No	We are currently using a custom contact management application with rudimentary workflow. We are implementing SunGard's 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

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & ...)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
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 blade server running MS SQL database	IBM iSeries (fka AS/400)	Intel / Microsoft file server / Active Directory	Outsourced: Oracle OnDemand	Wintel		HP Intel servers		Windows 2003	2 Dell Servers running Windows 2003 and a Plasmon Optical Jukebox		HP UNIX, Oracle database, MS Access User Interface	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.	Implementation of Medicare Part D for prescription drugs. Implementation of new Presbyterian CREDO program for clergy. Service delivery improvements / enhancements, including automated workflow and Web-based member services, focused on e-health and e-learning. Design and implement new business intelligence capabilities.	CRM, BCP, website self-service features / functions, document scanning; Anything, Anyone, Anywhere, Anytime	Develop additional lending and online credit union services / Upgrade pension online reporting / Procedures Documentation /	Project Management Standards, BCP real-time testing, CRM/Marketing, ECM continued rollout			Expanded market initiatives		Redesigned Retirement Module; Generic Retirement Plans; 403(b) Roth IRA; Outsource State Tax Withholding; ACT2005	Introduction of Life Cycle Funds - migration to Cleveland Hot Site by 7/1/2007 - and continued pursuit of partnerships with the institutions of the United Church of Christ.		1. Implementing a Benefits Portal servicing Plan Administrators providing single point of access to Participant Management, Pension and Health & Welfare services 2. Implementation of a new Health & Welfare administration system (SunGuard-Compass) providing greater depth of service for participants 3. Implementation of a new plan administration facility for Plan Sponsors providing improved plan management tools. 5. Implementing an operation wide implementation of an	Enhancing new technology to optimize Customer Service efficiency
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 AS/400.	Electronic Data Management to replace tape back-up capabilities. Implemented RSA web security to provide secure online member access. Implemented Stellect ECM in support of strategic workflow automation initiative. Implementing IBM blade server capability and VMware to better utilize server capacity. Implement batch process automation and increase remote access capabilities.	No.	New antispam solution / Replacing our core switch with gigabit power over Ethernet / Upgrade firewall to Cisco's ASA line	Focus on security protocols. Continued testing and development of BCP/DR.	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	The deployment of the Cleveland Hot Site will also include major upgrades to the Pension Boards infrastructure in NYC. The resulting architecture will enable product rollout to a wider market on a 24/7 basis.		Virtual servers (VMWARE), replicated iSCSI SAN for centralized storage. 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. Streamlining Telecom / Network Circuit Utilization	Recently completed major infrastructure upgrades; no current plans for additional changes

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & MBB)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
10. Has Your Organization Articulated a Technology Infrastructure Strategy, Formally or Informally? If YES, Please Briefly Describe It.	No	Yes. A new 5-year IT Strategic Roadmap was developed in 2006 and serves 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.	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 MBB LAN/WAN and Web hosting services. Windows/ iSeries Servers. Supporting remote access and PDAs	Yes; IBM iSeries supports core membership system; all additional systems based on Windows OS servers; VPN and firewall by Sonicwall; Offsite Website hosting. Further rollout of mobile capabilities. All of the above with a watchful eye towards the "ongoing costs" of maintaining hardware and software components.	-	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
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 SL monitoring in-house; Gartner Benchmarking Service in 2007	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

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC & MMBB	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
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 major IT projects.	Yes; top-down approach with project steering committees, as necessary	no	An executive committee for all enterprise 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 MMBB 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.
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%	10%	15.2%; <1% of total consolidated operating revenue	10%	For 2006: \$12MM (18%)	12%	-	15 - 20 %	27%	\$1.77MM (11.7%)	IT represents approximately 11.2 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	47 FTE: Administrative (5); Information & Data Support (13); Infrastructure (7); Internet Strategy & Operations (8); Oracle Applications (6); Technology Support (8)	24	-	75	5	F/T Employees 7	2 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 6, increasing to 15-20 for 2007 project initiatives	1

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & ...)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
13D. How Many Total Full-Time Equivalent (employees only) in Your Organization?	25 in Retirement Services	203	179	23.5	354	200	-	200	90	F/T 75	70	-	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 within LOBs.	Telecommunications	-	Yes, Non IT functions include retirement operations, insurance operations, records retention	-	N/A	IT is responsible for telephone system operations. Now providing Graphic Arts and Layout Support to an array of communication and marketing efforts.	Yes	Enterprise Project Management Office- 15 budgeted headcount.	Telecommunication s, 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 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	-	Internally manage all secured hosting on HP DL360, ML530, WinXP 2003. Host general informational pages and non-secured site, off-site at AmericanEagle.com	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 WebXtender Imaging System which also runs on a Dell server.	-	Currently Comsquared Unisearch, Sun/Unix platform HP 700 MX Optical Library, 9.1 GIG optical disks. In 2007 moving to ASP supported PowerImage product at Sungard EBS.	Vignette (formally Tower), Windows 2000, MS SQL Server, HP Jukebox
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 XP and Office 2003	IBM/HP's running Win2000 Pro/Win XP Pro	Dell Optiplex or HP 7600 running XP sp2	Windows (Lenovo 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 XP Professional SP2	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)	Lenovo ThinkPad running MS Windows XP	IBM's running Win 2000 Pro/Win XP Pro	Dell Latitude and Precision running XP sp2	Windows (Lenovo) 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 & Lenovo Think Pad Notebooks running Windows XP Professional SP2	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) Installed	Not Applicable	BlackBerry	Treo600/650's running Palm OS	Palm Treo 700p	Treo, Nokia using GoodLink	Palm, Windows Pocket PC	-	Palm	Palm OS	Palm Tungsten/ Palm Treo (Meric VPN/ m Notes)	Treo 650's running Palm OS and Goodlink	Palm Windows CE	Palm 700W using Windows Mobile Technology for eMail and Calendar Sync.	HP iPaq (Pocket PC)
20. List MASS STORAGE System(s) Installed, if Any	---	IBM FastT600	Xitech SAN (2.4TB)	Linux Samba Built in-house 850gig raid	NetApp	EMC DMX / Symmetrix	-	HP SAN	IBM FastT600 with 5 terabytes	N/A	Currently installing EMC CX3-20 SAN Array in NY office. Will be adding EMC AX150 SAN Array at Cleveland office.	n/a	EMC SAN Clarion 4700 and CX400	EMC Clarion CX400 SAN

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC & CMU	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
21. List EMAIL or GROUPWARE Hardware Platform and Software Installed; If Out-Sourced, Name Vendor	Microsoft Outlook Office	MS Exchange and Outlook. Secure Email in 2007.	Lotus Domino/Notes running on IBM iSeries	MS Exchange 2003 / Outlook 2003	Microsoft Exchange	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 2003/Exchange 2003	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 8 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	Avaya S8500 IP-PBX	Avaya Merlyn Legend	Avaya VOIP Switch	Interactive Intelligence CIC		Avaya	Inter-Tel	Nortel 11 C	AVAYA - IP Office		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 RCN)	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. Revised across enterprise in 2006. IT DR testing in Q4 2006	Yes		Yes	Written and Tested DR Plan	Yes, Business Continuity Plan	The Disaster Recovery Plan as well as the Business Continuity Plan have been written. Both plans require periodic synchronization with our changing environment.	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	Yes; Sungard Recovery Systems	No	Currently creating hotsite at remote location. Completed Q4 2006	Sungard, linked via EMC SRDF tools		Yes currently, Rentsys	SunGard facilities in Scottsdale for servers and local facility for workstations.	MABB Hot Site(VF): FTP w/ high availability:remote journaling	Hot site will be deployed in Cleveland by 7/01/2007. Dell consultants and EMC consultants and internal staff will collaborate on initial setup and synchronization. Ongoing operation will be supported by internal staff. We will be pursuing a collaborative warm-site solution with our UCC headquarters in Cleveland and perhaps one additional location.	Being Developed	Currently Cold site, SunGard Recovery Services - Moving to Hot-Site Replication in 2007	Coldsite with Sungard; also maintain remote Data Center for critical applications at MCI
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

**Church Benefits Association -- Information Technology Group
Business and Technology Survey**

11/17/2006

	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	Free Methodist Foundation	GuideStone Financial Services of the SBC	Lutheran Church - Missouri Synod	Ministers and Missionaries Benefit Board of the ABC (ABC & MMBB)	Pension Boards United Church of Christ	Seventh-day Adventist Retirement Plans	United Methodist Church General Board of Pension and Health Benefits	YMCA Retirement Fund
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. Our credit union systems run on 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	Not at this time.	Yes	Not as a core operating system. IT Appliances, VMWare, Future versions of Oracle and Monitoring Software are places where we see Linux fitting in.	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; Monthly annual intrusion audit by third-party firm. Radius server ties security throughout networks. Implementing tougher security policies regarding passwords for database logins. Using encryption and IPSec for remote logins.	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