

# Information Technology Group

## Current Major Business/Technology Initiatives

Church Benefits Association - 2007 Annual Meeting  
"To Serve Well...Be Well" – Scottsdale, AZ  
November 27, 2007

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## Purpose

The purpose of the IT Group is to leverage our business and technology experience and knowledge to better support the missions of our organizations. This session is a forum for sharing ideas and information pertaining to current initiatives, discussing and evaluating technological trends and innovations that can add value, and soliciting outside experience to further augment our knowledge in new and emerging technologies relevant to our operations.

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## Our Goal

**\* To provide an overview of some current, major business and technology initiatives/projects underway within our organizations.**

**\* Note that Information Technology is merely an enabler to successfully achieving the business goals.**

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**Assemblies of God**  
**Ministers Benefit Association**  
**(Jim La Vallee)**

New Information (cross functional) Team was formed.  
Website redesign with new valuation tools and branding.  
Merged three external offices into HQ.  
Gifted 85 computers to other charities.  
E-statements and statements on demand.  
Doubled size of technical staff.  
Completed last year's strategic initiatives.

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**The Board of Pensions of the**  
**Presbyterian Church (U.S.A.)**  
**(Ed Driscoll)**

**2007 Strategic Initiatives**

- Developed New Web Service Capabilities – Transactions, Calculators, Links
- Developed and Tested Electronic Imaging and Critical Data Replication
- Integrated and Expanded Workflow Automation
- Completed a Business Intelligence Assessment and Upgrade
- Completed a Lawson Financial System Upgrade
- Completed Business Continuity and Disaster Recovery Testing and Training

**2007 Tactical Initiatives**

- Implemented Document Management using MS Share Point
- Implemented Email Encryption on Outbound Email
- Implemented Additional Security Controls



The Board of Pensions of the Presbyterian Church (U.S.A.)

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**The Board of Pensions of the**  
**Presbyterian Church (U.S.A.)**  
**(Ed Driscoll)**

**2008 Strategic Initiatives**

- Implement New Web Service Capabilities and Initiate Phase II Expansion
- Implement Remote Hosting and Electronic Data Replication
- Update and Test New Business Continuity and Disaster Recovery Capabilities
- Expand Use of Business Intelligence Tools and Capabilities

**2008 Tactical Initiatives**

- Expand Remote Access Capabilities
- Research and Test Use of Thin Clients to Replace Desktop PCs
- Expand Use of Document Management Using MS Share Point
- Expand Use of Email Encryption on Outbound Email
- Assess New or Additional Security Controls



The Board of Pensions of the Presbyterian Church (U.S.A.)

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## Christian Brothers Services

(Tom Drez: tom\_drez@cbservices.org)

### 2007

- This was the “Year of Communications”: Webinars, audio conferences, podcasts, RSS feeds, email broadcasts, audio/video productions; created studio
- Completed many infrastructure upgrades (i.e. iSeries, SAN, UPS, Wintel Servers)
- Completed CRM Phase 1: all divisions, one view of an employer, collecting preferences
- Scanning of documents and electronic filing now common place
- Appointed a Director of Business Continuity Planning (half-time)
- Started healthcare claims imaging/OCR project to create ANSI 837 records from paper

### 2008

- Strive for “anything, anywhere, anyone, anytime”; develop to the browser
- Plan for the customer, the employee, the stake holder of the future
- Complete upgrades of major back-office applications (i.e. DB Plan, P&C)
- Create one website for individual plan participants with federated security to providers
- Determine next generation desktop, laptop, and PDA; laptops and PDAs fully encrypted
- Determine Electronic Bill Presentation and Payment (EBPP) solution
- Implement multimedia contact center
- Implement BusinessObjects for enterprise reporting and business intelligence
- Complete annual improvements to security, server replacement/consolidation, & backups

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## CHURCH OF THE BRETHREN BENEFIT TRUST

(Eric Thompson: ethompson\_bbt@brethren.org)

### 2007

- Insurance Coverage Support Website
- Upgraded Windows Active Directory to prepare for Exchange 07 and MS-SQL 05
- Expanded services to the Credit Union for
  - ACH
  - Check
  - Credit cards

### 2008

- Co-Location of application servers
- Customer Relations Management (CRM)
- Web development for client single-sign on

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(Clayton Crawley: ccrawley@cpg.org)

- 2007 Major IT Projects: Completed and Underway
  - Hotsite Locations for Telephony and Data Installed
  - VoIP Rolled-out to Off-Site Employees
  - Testing of IT Disaster Recovery Plans
  - New Server Room Completed
  - OC-12 Ring Installed as Mesh Network for all Locations
  - Continued Expansion of Oracle Unified Database Hub
  - Oracle CRM Deployed to new Unified Call Center
  - Web Self Service Live for Three Business Units
  - End-to-End Enterprise Application Integration Implemented: Document Generation to Content Management to CRM

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(Clayton Crawley: ccrawley@cpq.org)

- 2008 Major IT Projects: Planned
  - Split Telephony to Remote Call Center Employees (VoIP/POTS)
  - Link of Unified Database with National Church Office
  - Expansion of Web Self Service to Online Payment
  - Continued Roll-out of ECM and Document Generation
  - Continued Integration of Enterprise Applications
  - Client Web Self-Service Applications Initiated
  - Creation of Director of Security Position for Enterprise
  - Continued Planning for Major Health and Life Initiatives

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## Evangelical Lutheran Church in America Board of Pensions

(Steve Willems: swillems@elcabop.org)

- Multi-Year Business-Driven IS Strategy
- Enterprise Governance Risk & Compliance (SAS112)
- Eligibility System - Review, Strategy & Implementation
- CRM System - Strategy & Implementation
- Deployment of Office 2007 and Sharepoint
- Server Consolidation using VMWare
- Data Center Environmental Upgrades
- Enterprise Reporting

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GENERAL BOARD OF PENSION AND HEALTH BENEFITS OF THE UNITED METHODIST CHURCH

(Eileen Kane: ekane@gbop.org)

### Completed Initiatives

- Implemented new combined DB/DC clergy retirement plan
- Completed DR vendor search – moving from SunGard to IBM 12/07
- Implemented SunGard's workflow automation including an imaging system conversion
- Implemented standardized quarterly metrics for business to measure IT value
- Continued infrastructure streamlining – server consolidation, upgrades and virtualization

### Initiatives Underway

- 13 months into our major IT transformation
  - Implementing new Health Administration System with Ceridian – Launch 11/07
  - Implementing new Plan Sponsor Portal – Launch 3/08
    - Single Sign - On
    - Unified SOA – including early adopter participation with SunGard and TIAACREF in development of their new ESF product
  - Implementing Business Objects performance and budgeting solution
  - Continued COBIT process evaluation and improvement efforts

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(Eileen Kane: ekane@gbop.org)

**On the Horizon**

- Remaining elements of IT Transformation
  - Participant Portal
  - Customer Service Representative full integration
  - Data warehouse
- Major upgrade of retirement recordkeeping software – SunGard Omni suite
- Supporting new facility being built, data center design, communication reqs, etc.
- Formalization of Quality function to consolidate distributed model:
  - incorporates both SQA and BPM
- Modifications to the current Life Stage Investment Service
- Evaluation of institutional asset management software solutions

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**GuideStone Financial Resources  
of the Southern Baptist Convention**

(Rick Hart)

- Implemented Wi-Fi throughout building
- Implemented Citrix remote access
- Enhancing the utilization of SMS to manage desktop configurations
- Upgrade of IBM AS-400 to I-Series
- Upgraded the Insurance billing / eligibility system
- Redesign of web site
- Creating the Office of Architecture
- Enhanced focus of information security
- Preparation to transition current phone system to Voice over IP

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**Lutheran Church – Missouri Synod**

(Bob Cushman: bob.cushman@concordiaplans.org)

**2007 in Review**

- Continued to push “The Church’s Plan”
  - Adoption rate > 71%
  - First year 403(b) assets > \$ 39m
- Started new Health & Wellness program
- Began offering HMO product in specific geographic locations
- Provided electronic invoices to our universities
- Rolled out electronic bill pay for our 5,000 employers

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**Lutheran Church – Missouri Synod**

2007 Continued

- Redesigned website look and feel, with a web content management system
- Implemented a new imaging system with workflow in every area of Operations
- Rolled out electronic desktop imaging software to Operations staff
- Upgraded VMWare server architecture
- Expanded SAN fabric and increased storage capacity 20% to 10TB
- Refined DR plan; including notebook & Blackberry devices for key personnel

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**Lutheran Church – Missouri Synod**

(Bob Cushman)

**Looking Ahead to 2008**

- Develop comprehensive long-term IT strategy
- Finalize testing and rollout of Citrix thin-client environment
- Develop an on-line system to test self-service with our universities
- Finalize upgrade of our Lawson ERP system
- Implement a record retention schedule
- Design and implement a content management system to support record retention for non-structured data
- Implement an eligibility file interface for Operations

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(Tom O'Neill: [toneill@pbucc.org](mailto:toneill@pbucc.org))

**2007 Implementations**

- Real-Time Data Replication to Hot Site
- Rollout of 4 New Retirement Fund Options
- Web-Based Insurance Benefit Enrollment
- Established New Business Relationships With UCC-Affiliated Institutions
- Re-Engineered Annuity Calculator

**2008 Agenda**

- Continued Focus on Relationship Development With UCC-Affiliated Institutions
- Rollout of Additional Self-Service Functionality
- Implementation of Re-Designed Website
- DR/BCP – Work In Progress

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**YMCA RETIREMENT FUND**



(Elliott Buchholz: buchholz@ymcaret.org)

**2006-07 In Review**

- Development of our own Business Continuity hotsite
- Expanded document imaging to our Legal and Finance documents
- Implemented archival process for email and website
- Begun holding remote training and presentations via webinars
- 85<sup>th</sup> Birthday of the YMCA Retirement Fund

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**YMCA RETIREMENT FUND**



(Elliott Buchholz)

**Looking Ahead: 2007-08**

- Redesign of systems to support splitting of two plans [401(A) and 403(B)]
- Revamp and redesign 403(B) Loan application and processes
- Provide customer support the ability to take control of YMCA customer computers to provide support (via web software)
- Upgrade Customer Service Contact Center Software

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**Thank You!**

**Resources:**

1. CBA IT Group Section of CBA Website  
(this PowerPoint presentation, the annual Business & Technology Survey, and more)
2. Contact the CBA IT Group via Tom Drez, Christian Brothers Services at 630-378-2903 or [tom\\_drez@cbsservices.org](mailto:tom_drez@cbsservices.org)
3. Feel free to contact any group member using their eMail address as listed on their slide(s).

Church Benefits Association Website  
[www.churchbenefitsassociation.org](http://www.churchbenefitsassociation.org)

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