

**Church Benefits Association -- Information Technology Group
Business and Technology Survey (11/10/2008)**

	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	General Board of Pension and Health Benefits of the United Methodist Church	GuideStone Financial Resources of the Southern Baptist Convention	Lutheran Church - Missouri Synod	Pension Boards United Church of Christ	YMCA Retirement Fund
IT Leader:	Jim LaVallee	Ed Driscoll	Tom Drez	Eric Thompson	Rev. Clayton Crawley	Steve Willems	Eileen Kane	Rick Hart	Bob Cushman	Tom O'Neill	Elliott Buchholz
Internet Domain:	AGFinancial.org	pensions.org	cbservices.org	brethren.org	cpbg.org	elcabbp.org	ghophb.org	guidestone.org	concordiaplans.org	pbucc.org	ymca.org
Date Last Updated:	10/16/2008	9/30/2008	11/10/2008	9/24/2008	10/18/2008	10/9/2008	10/16/2008	2/4/2008	10/23/2008	10/15/2008	10/20/2008
1A. Total # of DB Plan Participants?	None	39,850	27,000	-	Lay DB active participants: 1,646; Clergy DB active participants: 11,145	NA	Legacy Plan - 15,000, New 2007 CRSP plan -- 24,600,000	2,500	Concordia Retirement Plan 32,200 (DB)	N/A	N/A
1B. Identify DB Plan Software for ADMINISTRATION/RECORD KEEPING by Name or "Custom-Developed"	None	PeopleSoft HRMS vers. 8.8	Milliman MARC System Windows Application Server w/ SQL Database Server	-	SBC Benefits Workstation (Clergy DB and Lay DB)	NA	Benefits Access Portal custom developed for indicative and custom data elements; SunGard OmniPlus and Omni DBEN Recordkeeping System	Sungard OmniPlus	Lawson for administration & dbConnect from EDS for retirement calculations	N/A	N/A
1C. Identify DB Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	None	Inhouse IBM p-series servers	IBM BladeCenter attached to System i	-	Outsourced at QTS: SBC (Windows, Oracle)	NA	W2K web servers, HP L Class Unix, Oracle database; Recordkeeping Outsourced- SunGard ASP-HP UNIX	HP Intel servers	Moving from Windows to Unix	N/A	N/A
2A. Total # of DC Plan Participants?	24,000	9,231	1,224	4100	Lay DC active participants: 5,327	50,000	Active Clergy-24,600; Agency-1100; Voluntary DC UMPIP Clergy and Lay-32,600; Safe Harbor 401K-385	160,000	12,200 members with a balance in our 403B Concordia Retirement Savings Plan	12,343 members in the accumulation phase and 9,249 members in the annuity phase	75,000 total (44,000 active, 21,000 inactive, 10,000 retirees)
2B. Identify DC Plan Software for ADMINISTRATION/RECORD KEEPING by Name or "Custom-Developed"	Outsourced to Mc Cready & Keene (Indianapolis)	Outsourced to Fidelity	Outsourced to Vanguard	Expert Plan (formerly TSC)	Fidelity (Lay DC)	Outsourced (ACS)	Benefits Access Portal custom developed for indicative and custom data elements; SunGard OmniPlus and Omni DBEN Recordkeeping System	Sungard OmniPlus	Met Life	"Benefit Fund Administration System" developed by BICC Systems, Inc. of Chicago, IL.	Custom-Developed
2C. Identify DC Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	Outsourced; Call Center uses IBM I-Series	Outsourced to Fidelity	Outsourced to Vanguard	IBM IS AS/400	Outsourced: Fidelity (Mainframe, Websphere)	Outsourced (ACS)	W2K web servers, HP L Class Unix, Oracle database; Recordkeeping Outsourced- SunGard ASP-HP UNIX	HP Intel servers	Met Life	IBM iSeries (Eserver i5)	Compaq Servers, Windows 2000, Windows XP, MS SQL Server
3A. Total # of UDC Plan Participants?	870	n/a	n/a	-	N/A	NA	None	2500	-	N/A	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	N/A	Sungard OmniPlus	-	N/A	N/A
3C. Identify UDC Plan Hardware Platform for ADMINISTRATION/RECORD KEEPING; If Out-Sourced, Name Vendor	Outsourced; Call Center uses IBM I-Series	n/a	n/a	-	N/A	NA	N/A	HP Intel servers	-	N/A	N/A
4A. Total # of HEALTH Plan Covered Lives (Participants & Families)?	None	53,275	27,577	1400	15,511 Active employees and dependants; 8,461 Retirees and dependants	27000	over 14,000 primary, Total 30,000+	27,000	Concordia Health Plan: 20,000 active; 5,800 Med Sup; 22,650 dependants	12,326 participants	N/A
4B. Identify Health Plan ELIGIBILITY SOFTWARE by Name or "Custom-Developed"	Not Applicable	PeopleSoft HRMS vers. 8.8	BSSI Premium Plus	MMA Custom Database via VPN	FiServ ID3	Custom-Developed	Ceridian Administration System, WebMD for HRA administration and inquiry.	IBM's Genelco	Lawson for administration.	"Benefit Fund Administration System" - BICC Systems, Inc.	
4C. Identify Health Plan CLAIMS SOFTWARE by Name or "Custom-Developed"	Not Applicable	Outsourced to Highmark BCBS	Principal Financial Group CS3	MMA Custom Database via VPN	FiServ ID3 - Claims are external to ID3 and are handled by the carriers	Outsourced	Claims are administered by carriers	Outsourced	Blue Cross/Blue Shield handle claims.	BICC Software administers eligibility which is passed on a weekly basis to Highmark Benefits Systems.	N/A
4D. Identify Health Plan ELIGIBILITY HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	IBM System i (fka AS/400)	MMA Custom Database via VPN	Outsourced: FiServ (AS/400)	HP - Virtual Server	Outsourced-Ceridian-SQL database	HP Intel servers	Moving from Windows to Unix	IBM iSeries	N/A
4E. Identify Health Plan CLAIMS HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Outsourced to Highmark BCBS	Principal's IBM Mainframe	MMA Custom Database via VPN	Outsourced: FiServ (AS/400) - Claims are external and are handled by carriers	Outsourced (BCBS)	Outsourced-BCBSIL, UHC, Medco, Cigna Dental, VSP,UBH	Outsourced Highmark	Outsourced (BC/BS, Express Scripts, Cigna Dental)	Outsourced to Highmark Benefits Systems.	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 Liberty Mutual. 320 currently on disability.	LTD (14,788)	LTD 712	Long-term Disability 1,781; Short-term disability 2,392	1 Plan - "regular", 300	Clergy 20,000; Lay 4,600	34,000 participants	Concordia Disability and Survivor Plan (32,200 mbrs)	The Life Insurance and Disability Plan provides benefits to 3,156 members.	N/A

**Church Benefits Association -- Information Technology Group
Business and Technology Survey (11/10/2008)**

	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	General Board of Pension and Health Benefits of the United Methodist Church	GuideStone Financial Resources of the Southern Baptist Convention	Lutheran Church - Missouri Synod	Pension Boards United Church of Christ	YMCA Retirement Fund
5B. Identify Disability Plan ELIGIBILITY SOFTWARE by Name or "Custom-Developed"	Not Applicable	PeopleSoft HRMS vers. 8.8	BSSI Premium Plus	MMA Custom Database via VPN	UNUM	Custom-Developed	Benefits Access Portal custom developed for indicative and custom data elements; SunGard OmniPlus and Omni DBEN Recordkeeping System, Ceridian	IBM's Genelco	Lawson for administration.	"Benefit Fund Administration System" - BICC Systems	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	MMA Custom Database via VPN	UNUM	Outsourced (JPMorgan)	Migrated to SunGard's OmniAnnuity	Outsourced	Lawson for administration.	TPA - Metropolitan Life Insurance Co.	N/A
5D. Identify Disability Plan ELIGIBILITY HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	IBM System i (fka AS/400)	MMA Custom Database via VPN	Outsourced: UNUM	Outsourced (Aetna)	W2K web servers, HP L Class Unix, Oracle database; and Outsourced-SunGard ASP-HP UNIX	IBM's Genelco	Moving from Windows to Unix	IBM iSeries	N/A
5E. Identify Disability Plan BENEFIT PAYMENT HARDWARE Platform; If Out-Sourced, Name Vendor	Not Applicable	Inhouse IBM p-series servers	Principal's IBM Mainframe	MMA Custom Database via VPN	Outsourced: UNUM	Outsourced - JPMorgan	HP UNIX with SunGard ASP	Outsourced UUNAM	Moving from Windows to Unix	TPA - Metropolitan Life	N/A
6A. Identify Any OTHER Plans (e.g. P/C, Dental, Mental Health, etc.) and # of Participants in Each	Not Applicable	Dental - Aetna (1,222 mbrs); Supplemental Death (4,518 mbrs); Prescriptions-Express Scripts (23,676 mbrs); Mental Health-Cigna Behavioral Health (17,164 mbrs)	Property / Casualty	Dental, Vision, Flexible spending accounts, LTC, Med Sup	Dental -- Active 10,681; Dental -- Retired 4,526; Vision and Prescription are inherent coverages with the health plan. Mental Health is provided for all but 3 groups, equating to an approximately 98% coverage.	Survivor Benefits (36,529), Delta Dental (38,661), Value Options (29,265), Express Scripts (39,033)	Dental and Behavioral Health are bundled with health	Dental, P/C, Life, Long Term Care	Dental=Cigna Dental (20,000 mbrs; 42,650 lives); Cigna Behavioral Health (20,000 mbrs, 42,650 lives); Express Scripts (24,000 mbrs - includes med sup, 48,450 lives) VSP - vision (20,000 mbrs, 42,650 lives)	The Dental Plan provides benefits to 11,274 participants. The Mental Health Plan serves 7,147 participants. The Flexible Spending Plan serves 836 members.	N/A
6B. Identify OTHER Plans SOFTWARE by Name or "Custom-Developed"	Jack Henry CIF 20/20	Outsourced	CSC Point System	MMA Custom Database via VPN	FiServ ID3	Custom-Developed	Same as Health	-	Lawson for administration.	Eligibility for the Dental Plan and the Mental Health Plan and the Flexible Spending Plan is tracked by the BICC	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 System i (fka AS/400)	MMA Custom Database via VPN	Outsourced: FiServ (AS/400)	HP - Virtual Server	Same as Health	-	Moving from Windows to Unix	Eligibility is handled by IBM iSeries. Claims are outsourced.	N/A
7A. Do You Have a Customer Relationship Management (CRM) or Similar Strategy/Plan? If So, Please Briefly Describe	We have 19 FTE Customer Care Representatives working on a Cisco 7960 VoIP phone system. We have a Spanish language "split" and also use a Tap-link to get "screen pops" whenever a caller's ANI matches a number in our Salesforce.com CRM database.	Charter 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.	We are currently using a customized contact management feature built into SunGards - PowerImage AG application.	Yes, custom developed	No	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 and tracked by the system.	No formal CRM, but using Call Center Software integrated into IP Telephony system, plus some custom-developed software
7B. Identify CRM Software by Name or "Custom-Developed"	Salesforce.com with customized integration that imports ending account balances from our banking, trust and retirement systems.	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	SunGard	Custom developed	-	Custom-Developed	Call Center Software - ShoreTel; Call Tracking - Custom-Developed
7C. Identify CRM Hardware Platform; If Out-Sourced, Name Vendor	Salesforce.com is the platform	IBM Blade server running MS SQL database	IBM System i (fka AS/400)	Intel / HP	Outsourced: Oracle OnDemand	HP - Virtual Server	SunGard	HP Intel servers	-	Virtual Server via VMWARE running under ESX Server	Windows 2000 Server, MS SQL Server
8. List Major Business Initiatives Underway and/or Planned For The Next 12 Months	Continuing consolidation of our existing databases so as to reduce down to a functional three.	Expansion of Stewardship of Self program. Forward-looking review of the Medical Plan. Continued expansion of Presbyterian CREDO program for clergy. Implementation of additional Web Services for members, employees, directors, and other key constituents.	Business Intelligence, CRM expansion, BCP evolution, Increased website features for customers, employees, and service providers	Online environment for BBT customers	Expansion of Web Self-service Offerings; Continue DR real-time testing, CRM/Marketing Tools Expansion, ECM continued rollout	Eligibility and CRM Applications Replacements	Expand Portal capabilities to support Plan Sponsors , Participants, Welfare Tool upgrade , Lawson Upgrade, Facility design support	Expanded market initiatives, Property and Casualty	-	Continued pursuit of business relationships with the institutional arm of The United Church of Christ.	Application changes to support splitting of TD Plan from Retirement Plan and simplification of YMCA contribution percentages

**Church Benefits Association -- Information Technology Group
Business and Technology Survey (11/10/2008)**

	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	General Board of Pension and Health Benefits of the United Methodist Church	GuideStone Financial Resources of the Southern Baptist Convention	Lutheran Church - Missouri Synod	Pension Boards United Church of Christ	YMCA Retirement Fund
9. Is Your Organization Planning Any Major Technology Infrastructure Changes/Improvements Within the Next 5 Years? If so, Please Briefly Describe Them.	We migrated from AS-400 to IBM I-series in 2006. We are also redoing our entire security infrastructure with Cisco.	Complete Business Continuity and Disaster Recovery Redesign including migration of all critical systems to external data center with full data replication. Continue to expand Web Services platform. Fully implement server consolidation utilizing VMware to better utilize server capacity. Enhance remote access and thin client computing capabilities utilizing Citrix technology. Design and implement new VoIP telephony capabilities.	Deploy Multimedia Contact Center, Unite System i & Wintel Sides of the Data Center, Regular hw/sw upgrades	Creating an application layer CRM to unify all customer data across BBT's business units	Yes; Simplify, Integrate, Enhance are our three strategic watchwords.	SharePoint, Exchange 2007	Expansion of virtualization, New Facility - Data Center, Considering switch to IP based telephony	Web Redesign, Wireless, VOIP	Agreed to outsource our entire data center to ACS	Deploy Audio Visual technologies to reduce travel budgets and to increase productivity of remote workforce, along with further server consolidation via VMWARE.	No
10. Has Your Organization Articulated a Technology Infrastructure Strategy, Formally or Informally? If YES, Please Briefly Describe It.	Yes. IBM I-Series, Cisco, Dell, HP and Microsoft are our dominant vendors.	Yes. A 5-year IT Strategic Roadmap was developed for 2006-11. It serves as the blueprint for all major IT investments.	IBM System i 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. Self-managed hot sites for DR.	Browser based application development. Microsoft .Net development environment. Bias to purchased application vs. building applications. Alignment of IS strategy with business strategy.	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.	Yes, Containment strategy with legacy platforms/systems, total migration to Windows Intel platform	Completed an IT Strategy with the assistance of CSC. The strategy created 15 projects, many business driven to improve all aspects of delivering IT services.	Yes; IBM iSeries supports core membership system; peripheral systems are VMWare/Windows OS based; VPN and firewall by Sonicwall; Continued rollout of additional mobile capabilities.	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.	We are just beginning to. We call them Service Level Agreements. IT reports to the Senior VP of our Operations and IT division.	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	No. We have systems to monitor uptime, and monthly external audits for security	SLA's with outsourced vendors; Gartner Benchmarking Service in 2008; Rollout of internal SLAs to LOBs in Q4 08	Uptime metrics of business critical applications reported monthly.	Sytem availability, internal and external audits, Help Desk stats using Track It, Discretionary vs. Non Discretionary Spend, Staff utilization - production support, maintenance, strategic. Continuing to develop methods measure application fit and total cost of ownership.	Yes, internally developed service level agreements, Periodic peer metrics comparison by Gartner Consulting	These are being implemented with the new agreement with ACS. Will also implement others that are handled internally.	Yes; member correspondence is tracked to completion by pre-determined metrics. Help Desk software (Revelation) tracks ongoing system requests/problems.	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	All IT initiatives are discussed and approved in a two-step process 1.) launched at our annual Executive Team Planning Retreat in October and 2.) finalized by the budgeting process in February and Board approval in March. Our fiscal year begins April 1.	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 no project steering committees, as necessary	no	An executive committee for all enterprise projects (including technology projects)	Project Office in place.	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.	Yes, I.T.O.L.	This is currently being developed	IT initiatives are planned and reviewed by senior management during regularly scheduled Management Meetings.	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)	9.60%	10%	17.4%; <1% of total consolidated operating revenue	10%	16%	12%	20%	15 - 20 %	24%	10.60%	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?	1	26	25		17 FTE: Administrative (5); Information & Data Support (13); Infrastructure (7); Internet Strategy & Operations (8); Oracle Applications (6); Technology Support (8)	40 - Includes Project Office PM's, BA's and QA's	35 budgeted headcount	80	42 full-time employees		14
13C. How Many IT Full-Time Equivalents (contractors and consultants only) Do You Have "On Staff" To Support the Content of Question 13A?	6	0	0	0	No FTE contractors or consultants	0	15 to 20 for 2008 IT Transformation initiatives	0	8	3.5 consultants	1

**Church Benefits Association -- Information Technology Group
Business and Technology Survey (11/10/2008)**

	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	General Board of Pension and Health Benefits of the United Methodist Church	GuideStone Financial Resources of the Southern Baptist Convention	Lutheran Church - Missouri Synod	Pension Boards United Church of Christ	YMCA Retirement Fund
13D. How Many Total Full-Time Equivalent (employees only) in Your Organization?	20+ in Retirement Planning	200	183	24.5	425	200	245	440	93	72	80
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; Communications	-	Yes; business partner on all new initiatives for lines of business (LOBs). Project management through ITS business analysts within LOBs	Telecommunications	Enterprise Project Management Office-11 headcount, Organizational Measurement, and Process Management 2 Headcount	Yes, Records Retention	No	IT is responsible for telephone system operations.	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 until just recently. Will be completely in-house by this summer (2007).	Web hosting is co-sourced with DBSI utilizing IBM Blade servers running VmWare.	Lotus Domino/Notes software running on iSeries and IBM Blade Center hardware	Compaq DL380's running RedHat Linux, Apache webserver	Apache on Solaris. CMS using Macromedia Coldfusion	Internet outsourced to Visi, Intranet on HP Servers running Microsoft	Internally manage all secured hosting on HP DL360, ML530, WinXP 2003. Host general informational pages and non-secured site, off-site at AmericanEagle.com	HP Windows Server 2003	IBM xSeries server running Microsoft IIS	Outsourced to ePartners utilizing Dell Poweredge Servers running Windows Server 2003 and SQL Server	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 4 million images. We are actively seeking a new vendor and expect to implement a change by mid-2008. Retirement will be the very last division swapped over. This is going to mean that we will have two systems until about 2010.	EMC Centera running Oracle/Stellent ECM document management solution	Custom-developed Lotus Domino/Notes applications running on IBM System i	none	Interwoven with offsite hosting by Terremark	NA	ASP supported PowerImage product at Sungard EBS.	Outsourced to ACS	SharePoint based and customized through KnowledgeLake	Docs Open document management system running on a Virtual Server. This system works alongside our WebXtender Imaging System (EMC) which also runs on a Virtual Server.	Vignette, Windows 2000, MS SQL Server. Also utilize Docuware 5 for supplemental DI
17. List DESKTOP Hardware Platform and Software Operating System(s) Installed	Dell & MS Windows XP (2007 w/ 3 year plan to swap out). Moving slow on Vista. Excited about Sharepoint.	HP/Compaq running MS Windows XP and Office 2003	IBM/HP's running Win XP Pro	HP 7000series running XP sp3	Windows (Lenovo) and Apple	Dell, Windows XP	Dell 1.7GHZ to 3.4GHZ, 1 mb-1.5mb RAM, WinXP Pro	HP desktop Windows XP	Moving to thin-client hardware with VMWare's VDI product.	Dell Optiplex Desktops running Windows XP Professional SP2. Limited Vista deployment.	Dell desktops, Windows XP
18. List LAPTOP Hardware Platform and Software Operating System(s) Installed	Dell & MS Windows XP (2007 w/ 3 year plan to swap out)	Lenovo ThinkPad running MS Windows XP	IBM/Lenovo's running Win XP Pro	Dell Latitude and Precision running XP sp3	Windows (Lenovo) and Apple	Dell, Windows XP	Dell laptops, same configuration as above.	HP laptops Windows XP	Lenovo x60	Dell Latitude & Sony VAIO Notebooks running Windows XP Professional SP2	Fujitsu, Dell - Windows XP
19. List PDA Hardware Platform and Software Operating System(s) Installed	Apple iPhones, Treo 750W and Samsung Black Jack II we have staff in 14 states.	BlackBerry	Currently migrating from Palm Treo's to Blackberry BOLDs and STORMS.	Palm Treo 700p/755p Goodlink	Blackberry BES, iPhone using MS ActiveSync	Blackberry	BlackBerry Palm 700W using Windows Mobile Technology for eMail and Calendar Sync.	Treo Windows	Will pilot test the iPhone and move away frm BlackBerry	Treo 750's running Windows Mobile OS and Goodlink	Treo (Windows Mobile), migrating to Blackberry
20. List MASS STORAGE System(s) Installed, if Any	---	IBM Storage Area Network (SAN)	Xiotech SAN (9.6TB)	-	NetApp	EMC DMX	EMC SAN Clarion CX3-10 and CX400	HP SAN	IBM FastT600 with 10 terabytes	EMC CX3-20 SAN Array in NY office and EMC AX150 SAN Array in Cleveland	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. Secure Email fully deployed in 2008.	Lotus Domino/Notes running on IBM System i	MS Exchange 2007 / Outlook 03/07	Microsoft Exchange, Managed Solution by Azaleos	Microsoft Exchange	Outlook 2003/Exchange 2003	Microsoft Exchange/Outlook	Microsoft Exchange	Microsoft Exchange Server 2003 and Outlook	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 4 T-1 Spans for Voice. We also have SpringNet (up to 10 burstable T-1 Spans on-demand) for our data.	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	AT&T OC Ring @ 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	SBC Local carrier, AT&T long distance/800, 4 T1 ISDN lines, 10 voice trunks	MCI multiple T-1's	MCI - Shared Trunk Capacity	AT&Tsupplies 2 full voice T1s	Verizon (over 2 T1s)
22B. List PBX Platform Installed; If Out-Sourced, Name Platform and Vendor	Cisco VoIP w/ VPN	Nortel	Avaya S8500 IP-PBX	Avaya Merlyn Legond	Avaya VOIP Switch	Interactive Intelligence CIC	AVAYA 8700 - ACM V 2.2, IP enabled	Avaya	Inter-Tel	AVAYA - IP Office	Shoretel VoIP
23. List INTERNET Carrier(s) and TRUNK CAPACITY	See Above	Reliance Globalcom over 100MB fiber.	AT&T; (3) T1 lines	DLS (SBC) Quad T1's loadbalanced per packet 6Mbps	AT&T, Meshed OC12 Ring to All Locations	USInternet, Redundant 10MB bandwidth	SBC & Globecom 3 T1s fully redundant load balancing	UUNET T-3	Cogent with 1-T1 & a 10 meg MPLS network with ACS	XO Communications supplies 10MB MPLS	Verizon (1 T1 and 1 Shadow T1)
24A. Does Your Organization Have a Written Business Continuity Plan and/or IT Disaster Recovery Plan?	First Draft Completed in Feb. '08. Twenty-one external reviewers just starting to be heard from.	Yes to both	Yes	Yes, we have our Disaster Prevention and Recovery Plan while we are still working on a Business Continuity Plan	Yes. Use LDRPS software	Yes	Yes we have both and test each one every year	Yes	Written and Tested DR Plan	Yes	Yes
24B. Does Your Organization Contract for Hotsite, Colidsite, or Colocation Arrangements? IF YES, Name Vendor and Describe	Yes. Springfield underground (large cave).	DBSi in Valley Forge, PA provides full disaster recovery services	Yes; Sungard Recovery Systems for data center equipment and office center space	-	Yes. Hotsites in Atlanta, GA and Secaucus, NJ	USInternet, linked via EMC SRDF tools	Currently Hot site IBM Recovery Services	Yes currently, Rentsys	SunGard facilities in Scottsdale for servers and local facility for workstations. Looking to eliminate SunGard.	No contract arrangement is in place. We are self-administering the real-time replication of data between a SAN array in NYC and a SAN array in Cleveland. Process utilizes EMC's	We lease our own additional space as a Hotsite
25. List WIRELESS LAN System(s) Installed, if Any	We are actively planning to make our new building a Cisco-equipped Wi Fi facility (2009).	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	CISCO	Aruba	None	3Com Wireless Access Point - Model 7250	Compaq Wireless, Internet access only with WEP security

**Church Benefits Association -- Information Technology Group
Business and Technology Survey (11/10/2008)**

	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	General Board of Pension and Health Benefits of the United Methodist Church	GuideStone Financial Resources of the Southern Baptist Convention	Lutheran Church - Missouri Synod	Pension Boards United Church of Christ	YMCA Retirement Fund
26. Is Your Organization Considering the Use of LINUX? If YES, Describe	We did look at it. We finally joined the IBM migration away from AS-400 to the I-Series. Having said that, we are obsessed with our Web Services and Security needs. Today 52% of all of our retirement transactions are solely completed by our clients on-line. The rest of AG Financial Solutions will have single PIN log-in by early 2008.	No	Yes; hardened versions of Linux for specialty apps	Yes, all web services 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	Not as a core operating system. IT Appliances VMWare Future versions of Oracle and Monitoring Software are places where we see Linux fitting in.	NO	Not high priority	Not at this time.	Security appliances only; not for servers or desktops
27. Please Describe Your Organization's Security Strategy	We continue to work with all of our vendors to integrate encryption techniques and firewall disciplines. Last year we had an outside firm conduct intrusion and other aspects of a comprehensive security audit. This year we are acting on their recommendations. We are also going to encrypt each and every lap top computer. (We have traveling personnel based in fourteen states).	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 practice good information handling while striking 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.	RSA Keyfobs, Strong Password Enforcement, Single Sign-on Manager	All data is confidential. We are a trusted repository of member and sponsor data. We have multiple layers of security.	Antivirus intrusion detection vulnerability scanning group and local policies spyware pest control	Dedicated security FTE, consult with outside security company to perform assessment and penetration testing	Completed outside System Audit, working on formalized procedures, outsourced network security and monitoring to Solutionary 24x7.	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.	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
28. List Business Intelligence Tools in Use.	SAP Edge (formerly known as Business Objects Crystal Decision)	Business Objects Enterprise Suite	Business Objects Enterprise XI	na	Oracle BI Enterprise Edition (Installation Q4 08)	-	Business Objects XI SQL Sever Reporting Services	Sql Reporting services; Business Objects	Access, Excel, Crystal Reports	Business Objects	-