

Information Technology Group

Current Major Business/Technology Initiatives

Church Benefits Association - 2008 Annual Meeting

“Enterprise Risk Management” – Naples, FL

December, 2008

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.

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.

YMCA RETIREMENT FUND



(Elliott Buchholz: buchholz@ymcaret.org)

2007-08 In Review

- Support of Plan Changes
 - Splitting of Tax-Deferred Plan from Main Plan; including several Plan changes that affect system functionality
 - Inclusion of Roll-Ins to our Tax-Deferred Loan Program
- Implementation of Business Intelligence Tool: IQ4Bis
- Development of In-House Web-based Loan Origination system to replace vendor solution
- Implementation of Quarterly Account Statements
- Automation of DOL Corrections procedures for Voluntary Accounts

YMCA RETIREMENT FUND



(Elliott Buchholz)

Looking Ahead: 2008-09

- Enhanced Call Center System (ShoreTel)
- Remote Control of YMCA desktops for enhanced Technical Support of systems issues (GoToSupport)
- Web-based Chat support of customers
- Initiation of Withdrawal requests via website
- Shift to Daily Interest from Monthly calculation



Pension Boards United Church of Christ

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

2008

- Rollout of completely redesigned website (www.pbucc.org)
- Re-Engineered all actuarial/mortality Processes
- Extensive testing of DRP/BCP functionality
- Enhanced web based capabilities for UCC institutions
- New Vision Plan offering
- Established new business relationship with large UCC affiliated institution

2009

- Continued focus on relationship development with UCC affiliated institutions
- Rollout of additional self-service functionality
- Migration to new banking platform for both custody and annuity payments
- Compliance related upgrades to existing processes
- Leverage DRP/BCP enhancements to provide day-to-day ROI
- Further server replacement/consolidation via SAN, VMware

MMBB Initiatives

(Rey Figueroa: rey.figueroa@mmbb.org)

■ During 2008

- Built, tested, and migrated to a Windows 2003 Server with DHCP and DNS service to leverage Active Directory. We previously used Novell Netware.
- Redesigned member indicative data files to move from a flat file structure to a relational database structure with the flexibility of using unique IDs other than SSN.
- Redefined and enhanced our business continuity procedures and established a cross functional incident management team to handle all aspects of the business environment.
- Completed a customized project tracking system for our Communications/Education Unit

■ For 2009

- Establish a digital repository all business procedures
- Implement backup procedures for all servers
- Continue to explore technologies that reduce dependency on the office environment
- Explore electronic bill presentment for our employers

Lutheran Church – Missouri Synod

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

2008 in Review

- Completed an IT Strategy using CSC as advisor
- Fifteen projects identified from IT Strategy
- Reached agreement with ACS to outsource entire data center
- Began research on possible hosted VOIP phone system
- Began testing thin-client workstation environment with VMWare's VDI solution.
- Moved Web Reporting to Google Analytics
- Implemented Board Portal based on SharePoint
- Converted Disability system into Lawson

Lutheran Church – Missouri Synod

(Bob Cushman)

Looking Ahead to 2009

- Continue to develop / refine relationship with ACS
- Complete 10 of the 15 projects identified from IT Strategy
- Implement improved processes
- Implement record retention / destruction
- Evaluate replacing existing imaging system



(Eileen Kane: ekane@gbop.org)

Completed Initiatives

- Launched new Ceridian health administration system
- Launched new plan sponsor and customer service Portal for retirement, health and welfare benefit administration
- Implemented Business Objects budget and performance solution
- Eliminated ~ 50% of the organizations custom



(Eileen Kane)

On the horizon:

- Launch of new welfare product in partnership with UNUM
- Core recordkeeping system upgrade – SunGard Omni suite
- Evaluation of intuitional asset management and wealth management solutions
- Design and development of new facility/data

Evangelical Lutheran Church in America Board of Pensions

(Steve Willems: swillems@elcabop.org)

- Eligibility / Billing System Replacement
- Microsoft CRM Implementation
- Microsoft Office SharePoint Server 2007 Implementation
- Microsoft Exchange 2007 and E-Mail Archiving
- Microsoft System Center
- IT General Controls – Monitoring
- Intrusion Detection / Prevention System
- Replace Data Back-Up System



CHURCH PENSION GROUP

Serving the Episcopal Church and Its People

(Clayton Crawley: ccrawley@cpg.org)

- 2008 Major IT Projects: Completed and Underway
 - Testing of IT Disaster Recovery Plans (x2)
 - Split Telephony to Remote Call Center Employees (VoIP/POTS)
 - Continued expansion of Web Self Service for use by clients and customer service reps
 - Complete overhaul of Publishing Commerce website
 - Complete overhaul of CPG Intranet
 - Approval for Link of Unified Database with National Church Office secured



CHURCH PENSION GROUP

Serving the Episcopal Church and Its People

(Clayton Crawley)

- 2009 Major IT Projects: Planned
 - Expansion of Web Self Service to Online Payment
 - Continued Roll-out of ECM and Document Generation
 - Planning for the Support of Major Health and Life Initiatives across the Episcopal Church
 - Looking at Email/Unified Messaging to SaaS
 - Thin Client/Cloud Computing Investigation Begins



Christian Brothers Services

(Tom Drez: tom_drez@cbservices.org)

2008

- Completed new web-based Participants Resource Section for health care.
- Completed IT Internal Controls Assessment and SAS 70 Documentation.
- Completed many infrastructure upgrades (i.e. iSeries, Avaya, SAN, Wintel Servers).
- Determined next generation desktops, laptops, PDAs, and Operating System (Win XP Pro).
- Near completion on healthcare claims imaging/OCR project to create ANSI 837 records.
- Began major upgrades of back-office applications (i.e. DB plan, P&C).
- Began company-wide Business Intelligence initiative.
- By 1/1/09, all backup tapes and PDAs will be fully encrypted.
- Began exploring collaboration with other CBA IBM System i organizations to improve economies of scale.



Christian Brothers Services

(Tom Drez)

2009

- Complete upgrades of major back-office applications (i.e. DB Plan, P&C).
- Complete Multimedia Contact Center Upgrade.
- Upgrade web-based Participants Resource Section with federated security to providers and add retirement planning services.
- Determine Electronic Bill Presentment and Payment (EBPP) solution.
- Continue BusinessObjects for enterprise reporting and business intelligence.
- Complete annual improvements to security, server replacement/consolidation, & backups.
- Strive for “anything, anywhere, anyone, anytime”; develop to the browser.
- Plan for the customer, the employee, the stake holder of the future.
- Continue exploring IBM System i collaboration with other CBS organizations.
- Begin rolling out single-signon company-wide.
- Actively participate in company-wide strategic planning.

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

(Ed Driscoll: edriscoll@pensions.org)

2008 Strategic Initiatives

- Implemented a Completely Redesigned, Interactive Web Site (pensions.org)
- Implemented External Data Center Hosting and Electronic Data Replication
- Updated and Expanded Business Continuity Plan (BCP)
- Expanded Disaster Recovery (DR) Capabilities and Replaced SunGard
- Contracted with Milliman to Outsource Claims Data Warehouse Functions

2008 Tactical Initiatives

- Expanded Remote Access Capabilities Utilizing Citrix Technology
- Expanded Use of Email Encryption to all Outbound Email Containing PHI



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

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

(Ed Driscoll)

2009 Strategic Initiatives

- Expand Web Service Capabilities – More Transactions, Calculators, Functions
- Complete Business Continuity and Disaster Recovery Redesign
 - Complete Migration of All Critical Systems to an External Data Center
 - Convert Board Data Center to Backup, Recovery, Development, Testing Site
- Design and Implement New Data Network and VoIP Telephony Capabilities
- Implement Milliman Claims Data Warehouse and Data Analytics Platform.

2009 Tactical Initiatives

- Complete Upgrades to Imaging/Workflow and Check Writing Systems
- Complete Upgrade to Microsoft Office 2007
- Pilot Thin Client Computing using Citrix Technology
- Enhance Electronic Records Management - Focus on Email and Network Storage



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

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 630-378-2930 or tom_drez@cbservices.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