OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

2023–2028
Information Technology Strategic Plan (ITSP)

Contents

Published January 2024

Letter from the Chief Information Officer

Dear Staff and Colleagues,

I am proud to present the 2023–2028 PERS Information Technology Strategic Plan. This plan presents a high-level view of the major projects that PERS Information Services Division will accomplish in the next five years to ensure PERS' success and growth.

The projects focus on two areas. These focus areas directly align with PERS Strategic Plan, the Governor's Oregon Agency Expectations, the Enterprise Information Services (EIS) Strategic Framework, the Legislature's key process measures (KPM), and the PERS Modernization Program goals.

Focus areas:

Modernizing PERS Oregon Retirement Information Online Network (ORION) — PERS' pension administration system. This is the backbone of the PERS system. As such, it must keep up with the times and continue to provide a robust, secure, and versatile system for our ever-growing PERS business.

Developing our IT workforce — our pension administration system is only as good as the people who build and maintain it. ISD will need to maintain a strong and talented team that can propel us into the future.

In the appendixes, you'll find how this plan aligns with the legislative KPMs, more detail about ISD projects currently in work, and the PERS Modernization Program.

Thank you for your interest and support,

Jordan Masanga
Chief Information Officer

Introduction

In today's fast-moving technological environment, a strong IT strategy is a key enabler of business success. To help ensure the ongoing success of PERS, the agency, PERS Information Services Division presents this plan to guide the agency's information technology strategy for the next five years.

The IT Strategic Plan focuses on PERS' information technology future within the framework of the agency's mission, vision, goals, and related projects. This plan maps to PERS business strategy, as outlined in the PERS 2023–2028 Five-Year Strategic Plan, follows the PERS Outcome-Based Management System (POBMS) framework, and outlines how ISD is supporting the agency's new Modernization Program.

At the same time, this is a living document that is intended to adapt to changes in the PERS landscape caused by legislative modifications, court rulings, and advancing technology.

About PERS Information Services Division

Information Services Division (ISD) is the information technology arm of Oregon PERS. It has five sections: Technical Operations, DevOps, Admin Support/Enterprise Architecture, Business Systems Analysis, and Enterprise Applications.

ISD provides all the information technology services and support for PERS staff and external audiences.

Services for PERS staff

- jClarety pension administration system.
- ORION pension-management system.
- Reporting tools (e.g., Microsoft PowerBI, data warehouse).
- Email.
- Productivity software (e.g., Microsoft Office, Microsoft Teams, Adobe Creative Suite).
- Computers, docking stations, and monitors for onsite and remote work.
- Telephones, telephony systems.
- Support:
  - Help Desk.
  - Application support.
  - Network and infrastructure support.
  - Database support.
  - Data and system backup.
  - System security.
  - Nightly batch support.

Services for external audiences

- Member call center.
- Online Member Services (OMS) web portal for members.
- Employer Data Exchange (EDX) web portal for employers (includes a production environment and a testing environment).
- Third-party administrator (TPA) interface (third-party business partners).

Staff

Information Services Division encompasses five sections. Total staff is about 65 people.

Information Services Division

Technical Operations	DevOps	Admin Support/ Enterprise Architecture	Business Systems Analysis	Enterprise Applications
Infrastructure	Dev Support	Enterprise Architecture	Business Systems Requirements	jClarety
Help Desk	Ops Support	Release Management		FileNet
Database Admin	Quality Assurance Test	IT Admin		
Enterprise Service Management				
Integration				

Internal tools

- ITSM: Ivanti (aka "Compass").
- Collaboration: JIRA, Microsoft Teams.
- Software Configuration Management: Subversion (SVN).
- DevOps Framework: Jenkins.
- Automated Testing Framework: Qmetry, TestComplete by SmartBear.

Project prioritization and tracking

Many agency-level projects require direct or indirect IT support. IT-related projects are prioritized and placed on the IT Priority List, where they are further prioritized against all other IT-related projects.

The list includes projects that are currently being executed and those that are planned. ISD uses various weighting factors to calculate an overall priority score for each project between 1 (low priority) and 5 (high priority). Weighting factors include:

- Agency priority.
- Division priority.
- Section priority.
- Business value.
- Ease of implementation.
- Effort (initial time estimate).

Note: For PERS enterprisewide programs and projects, including M&E, the prioritization and tracking are the responsibility of the Project Management Office (PMO) in the Central Administration Division. Nevertheless, these enterprisewide programs and projects are also included in the IT roadmap. For details about project prioritization and tracking, read Appendix A.

Project tracing

It is important for ISD to have traceability between strategic plans and IT projects. This traceability goes two ways:

- From the agency and IT strategic plans downward to the IT project level. This answers the question, "What IT projects are we doing to support the agency Strategic Plan and execute the IT Strategic Plan?"

- From the IT project level upward to the agency Strategic Plan. This answers the question, "Why are we doing this IT project?"

ISD also tracks what each project is "driven by." This identifies the source driving the need for the IT project. Driven-by sources include:

- External mandate — includes statewide directives and strategies, statutory and legislative changes, and court decisions.

- PERS Strategic Plan — needs defined by the agency-level strategic plan.

- PERS Modernization Plan — initiatives defined in the agency-wide modernization roadmap and plan.

- IT Strategic Plan — IT support for agency-level needs; used to define actions in this ITSP.

- IT foundational — needs that are part of ISD maintaining IT support for ongoing PERS operations, such as replacing or upgrading hardware and software, maintaining systems and networks.

- Portfolio Steering Committee (PSC) prioritization — prioritization of agency-level projects.

- ORION Steering Committee (OSC) prioritization — prioritization of and tracking of maintenance and enhancement needs for ORION, the agency's primary pension management system.

For details about project tracing, read Appendix A.

PERS IT current state

Pension administration system (PAS)

PERS' core enterprise application — in industry terms, the *pension administration system* (PAS) — that we use to process employer contributions, maintain member demographics and work history, and calculate benefits is called jClarety.

jClarety was first implemented in 2003 to administer a significant plan change (mandated by House Bill 2020), which introduced a third program, or "tier," to PERS called Oregon Public Service Retirement Plan (OPSRP). Soon after this was implemented, the agency embarked on the RIMS Conversion Project to convert the Tier One and Tier Two programs from the mainframe to jClarety so that all the programs were housed in one single PAS.

Since then, PERS IT has made numerous maintenance updates and enhancements to jClarety. Most updates result from program changes mandated by legislation or court rulings. However, jClarety has never been updated to improve member services or enhance the retirement experience; it has also never been updated to resolve technical debt issues that have occurred since the RIMS Conversion Project.

Today, the agency continues to maintain and enhance jClarety while also planning significant improvements. These improvements will modernize the PAS to enable omni-channel capabilities, automate processes, reduce manual offline tools, and protect member data as driven by the agency's Five-Year Strategic Plan.

Oregon Retirement Information Online Network (ORION)

jClarety is the nucleus of PERS' larger overall system architecture called the Oregon Retirement Information Online Network (ORION). ORION encompasses applications, systems, databases, and tools, many of which integrate or provide support as input or output of jClarety. These systems include the record and workflow management system called FileNet (both input and output of jClarety), Central Data Warehouse (output of jClarety), call center services (both input and output of jClarety), numerous offline tools to validate and calculate benefits (output of jClarety), and now applications being built on Microsoft Power Platform and in Azure.

PERS Data Center

During the RIMS Conversion Project, it was necessary to maintain two parallel systems to minimize disruption to the business. One system was the legacy mainframe that was operating under the General Government Computing Center (now called Data Center Services (DCS)), while the newly converted system was operating locally at the PERS Data Center in Tigard, Oregon. In 2020, a project called Production Data Center Migration was initiated to move the PERS Data Center in Tigard to the Co-Location facility at DCS in Salem, Oregon.

Today, due to the urgent need for resiliency and disaster recovery, there is an effort to migrate the servers from Co-Location to Managed Host within DCS.

PERS IT future state

Future landscape

By 2028, ORION's core applications will be rearchitected as independent, discrete business services. This will provide greater system security, flexibility, and growth.

ISD will have a robust backup and disaster-recovery plan to ensure business continuity in an emergency.

Our division will have a transformed working environment that encourages collaboration and innovation, attracts new talent, and retains current talent.

IT key needs

To see this future state of IT, ISD will have a larger team of highly skilled people, enhanced IT processes, and technology that enables automation.

People   **Sufficient people resources with appropriate IT competencies and expertise.** Supporting agency and operational needs requires additional IT people resources and expertise to augment PERS ISD staff.

Processes   **New and/or modified IT processes to meet new and/or modified technical needs.** New and/or enhanced IT development or operational processes may be required. Some may be manual (at least in the short term) and others automated.

Technology   **Appropriate IT infrastructure and solutions to support automated processes.** Particularly for PERS Modernization, we may need to provide short-term solutions initially to meet implementation deadlines, then provide more efficient long-term and automated solutions for ongoing operations.

For automated processes, and some manual processes, appropriate supporting infrastructure and technology solutions must be evaluated and selected. It is a goal in PERS Modernization to "automate processes and calculations, where possible, to improve efficiency and reduce risk."

Staying on track

The IT world is constantly changing. There are nearly daily opportunities to evaluate new products and improved technologies that could enhance ISD services. These opportunities may come with new requirements to support those new capabilities, which may present new risks to manage.

To avoid losing track of our goals or allowing them to become irrelevant, ISD must regularly review the ITSP and ensure we are on track. We must judge new and relevant opportunities in the technology marketplace to determine if they will help us or hinder us in reaching our goals. There may even be innovations that cause us to alter the goals themselves or add new goals that are higher priority than those we currently pursue.

ISD drivers

Multiple internal and external entities provide direction and influence on PERS IT.

Internal drivers, direction, and guidance

ISD internal drivers

- PERS mission
- PERS strategic plan
- ISD mission
- POBMS
- PERS modernization
- PERS operational needs

(center) **ISD strategy**
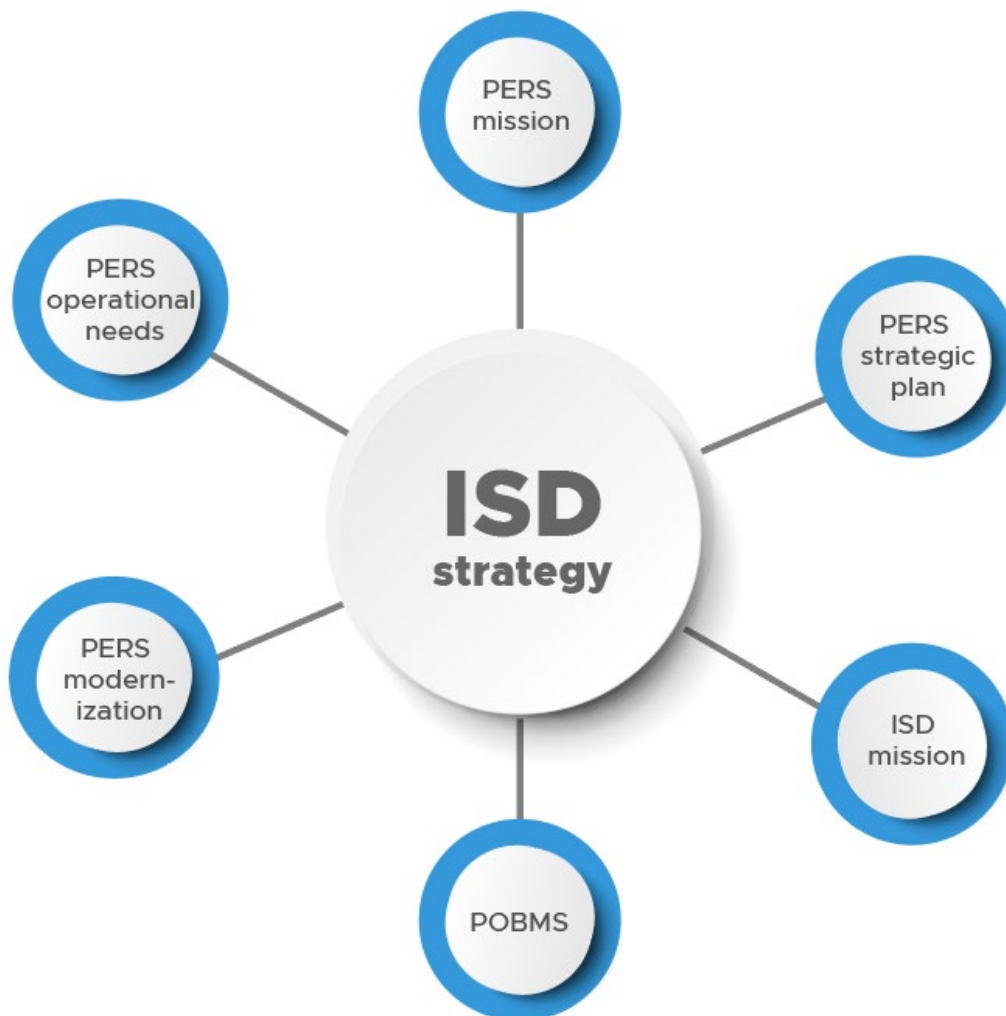
PERS mission

"We serve the people of Oregon by administering employee benefit trusts to pay the right person the right benefit at the right time."

PERS strategic plan

PERS identifies strategic priorities at the agency level. This ensures that we focus attention and effort on providing the capabilities and services that are the most critical.

ISD mission

The Information Systems Division (ISD) is responsible for providing IT services at PERS. ISD has defined its mission as:

> *"To enable the satisfaction of PERS members, we deliver quality services to agency stakeholders by providing accurate information and superior products that support decision-making and daily operational needs."*

ISD vision

To transform the PERS member experience through innovative systems and services.

ISD team values

1. PROFESSIONALISM

    Model the behaviors that promote and maintain a professional workplace.

    Respect our team members, invite diverse perspectives, and maintain a positive attitude.

    Be solution-oriented, bring an agency perspective, and work toward common goals.

    Make decisions that align with our core values and strategic priorities.

    Show up, come prepared, and fully engage in team discussions.

2. OPEN AND HONEST COMMUNICATION

    Commit to open and honest communication within the team and the division.

    Contribute to ensuring a safe environment in which we are able to be vulnerable, share problems, and ask for help.

    Actively listen to understand each other's perspectives.

    Proactively keep each other informed and seek to ensure mutual understanding.

    Speak with one voice regarding team decisions.

3. ACCOUNTABILITY

Take ownership of our individual responsibilities, decisions, and actions.

Be accountable for our individual behaviors and reactions. Commit to being aware of our biases and blind spots and stay open to others' perspectives and needs.

Set clear and reasonable expectations and provide timely follow-through on our agreements and decisions.

Be willing to admit our mistakes.

Give and receive constructive feedback, assuming positive intent. Commit to finding mutually agreeable solutions.

4. SUPPORTIVENESS

Put the needs of the team and our common goals ahead of individual interests.

Look out for one another's interests and consider the impact of our decisions and actions on others.

Support and trust each other's professional judgment and competency.

Support and commit to decisions made by the team.

Ask for and offer help in support of one another's interests and needs.

Support our individual and collective learning and growth.

POBMS

The PERS Outcome-Based Management System (POBMS) is an approach that enables PERS to monitor agency operations over time, identify areas that require attention, and analyze further to identify underlying root causes and potential corrective actions. This comprehensive approach enables PERS to identify gaps in business capabilities required to meet changing customer needs. POBMS defines outcome measures, and each project identifies the measures we expect will be improved by the project. For more information on how ISD supports POBMS, visit Appendix B.
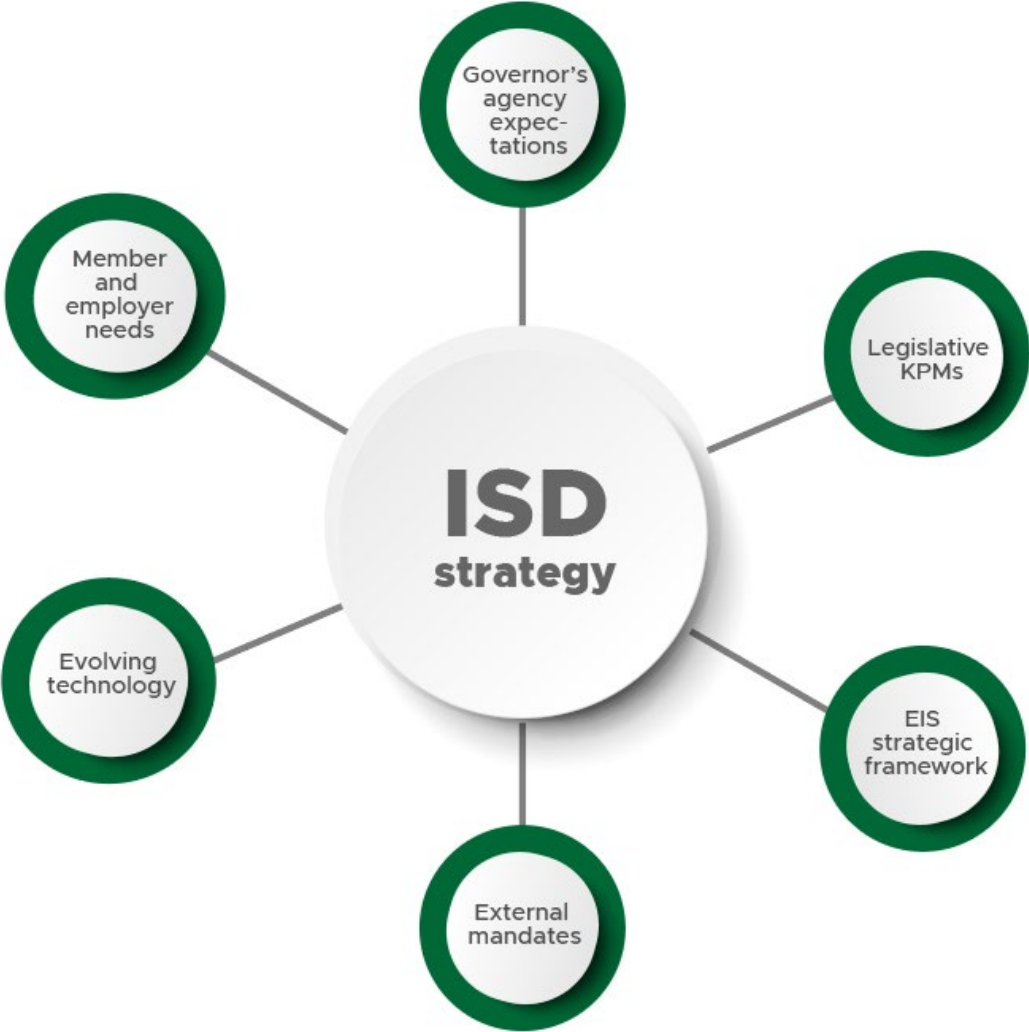
PERS modernization

The PERS Modernization Plan describes the changes to people, processes, and technologies that PERS intends to embark on through the 2029-31 biennium. This plan describes the PERS Modernization Program roadmap of specific projects and enabling work that will modernize business functions and capabilities within PERS, as well as the steps PERS will take to establish organizational agility to ensure operational effectiveness and efficiency. Refer to the section "PERS Modernization Program" on page 20 of this plan for more information on the modernization goals and benefits.

PERS operational needs

While carrying out this strategic plan, ISD will continue to meet the day-to-day needs of the agency. ISD is committed to providing resources, information, and tools that are accurate, efficient, and effective while maintaining the ability to customize support provided for each business area within PERS.

External drivers, direction, and guidance

ISD external drivers

Governor's agency expectations

Member and employer needs

Legislative KPMs

ISD strategy

Evolving technology

EIS strategic framework

External mandates

Governor's agency expectations

The Governor's "Oregon Agency Expectations" explains what our Governor expects Oregon agencies to do to work together, break down silos, and make enterprisewide system improvements. The Department of Administrative Services (DAS) provides the Governor's Office with updates on the agency's progress in meeting these expectations every quarter.

One of the expectations that impacts PERS IT is "managing information technology progress." It states, "Agencies of 50 FTE or larger are required to develop an information technology strategic plan. Plans should be developed with agency leadership and include how the agency aligns with the Enterprise Information Services' Strategic Framework and how modernization efforts will support the goals of the organization.

Legislative key process measures (KPM)

All state agencies establish KPMs to monitor the quality and value of their specific delivered services. They are approved by the legislature.

PERS program operations have a significant impact on Oregon's economy. With approximately 10% of Oregonians directly participating in PERS retirement plans, and many more who are family members and/or beneficiaries of those participants, delivering high-quality and cost-efficient services is essential.

Refer to Appendix B for details on this alignment.

Enterprise Information Services (EIS) Strategic Framework

The 2023–2026 Enterprise Information Services (EIS) Strategic Framework sets forth a new operating model that provides for an expanded mission, vision, and values. Five specific objectives represent a set of outcomes with corresponding goals that reflect the "desired state." Each goal is supported by key metrics aimed at providing baseline data for measuring and improving future performance.

Refer to Appendix B for details on this alignment.

External mandates

External mandates that affect PERS include legislative actions, statutory changes, and court decisions; these can significantly affect what PERS must do.

Evolving technology

The IT world is constantly evolving. There are nearly daily opportunities to evaluate new products and improved technologies that could enhance ISD services. These opportunities may come with new requirements and risks.

IT Strategic Plan

Components of the plan

The IT Strategic Plan links to the agency's 2023–2028 Strategic Plan. The components of the IT Strategic Plan are in support of the overall agency's strategies, goals, and objectives.

These components are hierarchical, meaning each item is broken down into more detail as you move down the list.

Component	Definition	Key questions it answers
Mission	A statement of the core purpose of the organization.	What is our purpose? Who are our customers?
Customer needs	Customer needs that require our organization's services.	What do our customers need from us?
Priorities	Services that are needed to meet the highest priority customer needs.	What services do we need most urgently to meet the highest priority customer needs?
Strategies	Courses of action directed at achieving an intended set of goals.	What do we need to do to meet or exceed our goals? What is the vision of the intended targets or outcomes?
Focus areas	Highest priority service concepts grouped by business/operations functional area responsible for those services.	To what business/operations functional areas do the highest priority services belong?

ITSP focus areas

The 2023–2028 PERS Strategic Plan defines six agency-level strategic priorities required for PERS to fulfill its mission and meet the needs of members, employers, and retirees. These six strategic priorities, along with how IT will support each focus area, are summarized below.

Strategy 1: Organization Management and Development

Focus area 1: Workforce development

IT will provide business solutions to develop training plans and the recording and monitoring of the employee development plans. Most of these capabilities are already available in Workday, but IT will provide supplemental solutions as necessary.

Focus area 2: Organizational communication

IT will provide business solutions to enhance organizational communications to improve employee engagement including the use of electronic surveys, intranet, and online videos.

Focus area 3: PERS Outcome Based Management System (POBMS)

IT will provide business solutions to support POBMS, including leveraging Microsoft's cloud-based PowerBI reporting capabilities.

IT will provide business solutions to support Enterprise Portfolio Management, including leveraging Microsoft's cloud-based Project Web Access (PWA).

Strategy 2: Member Services and Communications

Focus area 1: Member engagement

IT will provide business solutions to enhance member engagement, such as journey maps, member surveys, and IT support for the annual PERS Retirement Expo.

Focus area 2: Omni-channel service delivery

IT will provide business solutions to enhance and secure Online Member Services (OMS) through the support of the PERS Modernization Program.

Strategy 3: Data Consistency

Focus area 1: Data analytics

IT will provide business solutions to improve data validation in Employer Data Exchange (EDX) and provide technology to reduce manual processing through the support of the PERS Modernization Program.

Focus area 2: Data integrity

IT will provide business solutions to identify and clean up data issues and provide the capability to lock member data through the support of the PERS Modernization Program.

Focus area 3: Data utilization

IT will provide business solutions to utilize data and analytics to help drive and support agency decisions through the support of the PERS Modernization Program.

Strategy 4: Information Technology

Focus area 1: ORION system modernization

IT will provide technology solutions to modernize critical areas of ORION through the support of the PERS Modernization Program. This also includes

- Resolving missing functionality in ORION.
- Correcting operational issues in jClarety.
- Establishing a "cloud-first" strategy using Hybrid Cloud.
- Designing a versatile digital business platform.
- Completing a disaster recovery warm-site initiative in collaboration with the State Data Center.

Focus area 2: IT workforce development

IT will implement a digital strategy for attracting and retaining talent; develop an effective, open-space, collaborative, and innovative working environment; and provide next-generation training platforms to meet the demands of digital business optimization.

IT continues to reduce its dependencies on contractors since the budget approval in 2023-25 of key FTE resources. However, some core components of the PERS Modernization Program will rely on system integrators to implement certain business solutions (e.g., Client Relationship Management (CRM)).

Strategy 5: Financial Management

Focus area 1: Technology upgrades and system integration

IT will provide business solutions to improve productivity and reduce manual work through the support of the PERS Modernization Program.

IT will also provide support to upgrade the current version of Financial Edge to a cloud-based solution.

Focus area 2: Financial management resource development

IT will provide business solutions to improve financial accounting and reporting through the support of the PERS Modernization Program.

Strategy 6: Risk Management

Focus area 1: Risk management program

IT will provide business solutions to implement a cloud-based Enterprise Risk Management (ERM) program.

Focus area 2: Information security program

IT will provide business solutions and resources to implement security controls in ORION and in the cloud.

Focus area 3: Member privacy

IT will provide business solutions to support member privacy.

ITSP communications plan

ISD will work with PERS Communications Section to communicate the relevant parts of our plan to affected audiences.

ISD staff

Division meetings.

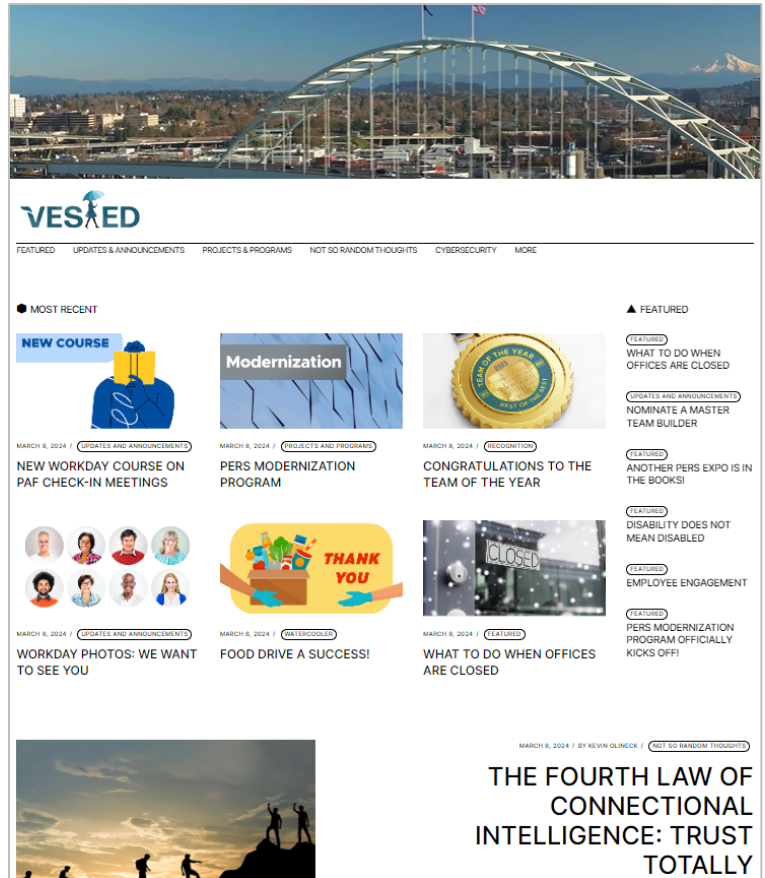Email correspondence.

PERS staff

Vested employee newsletter.

Division and all-staff meetings.

Members

Perspectives newsletter for active members.

Employers

Employer News newsletter.

PERS Modernization Program

ISD will pay a crucial role in the success of PERS Modernization Program — much like we did in the Senate Bill (SB) 1049 Program (learn more about SB 1049 on the PERS website).

Starting with strategy, then architecture and design, project initiation, implementation, and finally deployment and ongoing support, ISD is poised to support the program in achieving its goals and benefits.

During the 2023-25 biennium, ISD is positioned to support three projects under the Modernization Program: Telephony, Hybrid Integration Platform, and Client Relationship Management (CRM) (initial planning).

Program goals

TRANSFORM BUSINESS PROCESSES — Provide a digital self-service experience for both members and employers

AUTOMATE PROCESSES AND CALCULATIONS — Automate processes and calculations, where possible, to improve efficiency and reduce risk

ENGAGE MEMBERS IN THEIR RETIREMENT PLANNING AND EDUCATION

INTEGRATE LINES OF SERVICE — Incorporate all benefit plans and functionality into one integrated system, including online services, for a seamless experience for members, employers and staff

CREATE AN ADAPTABLE ENVIRONMENT — Build system on a platform which can be modified, in an efficient and cost-effective manner to reflect future needs and legislative changes
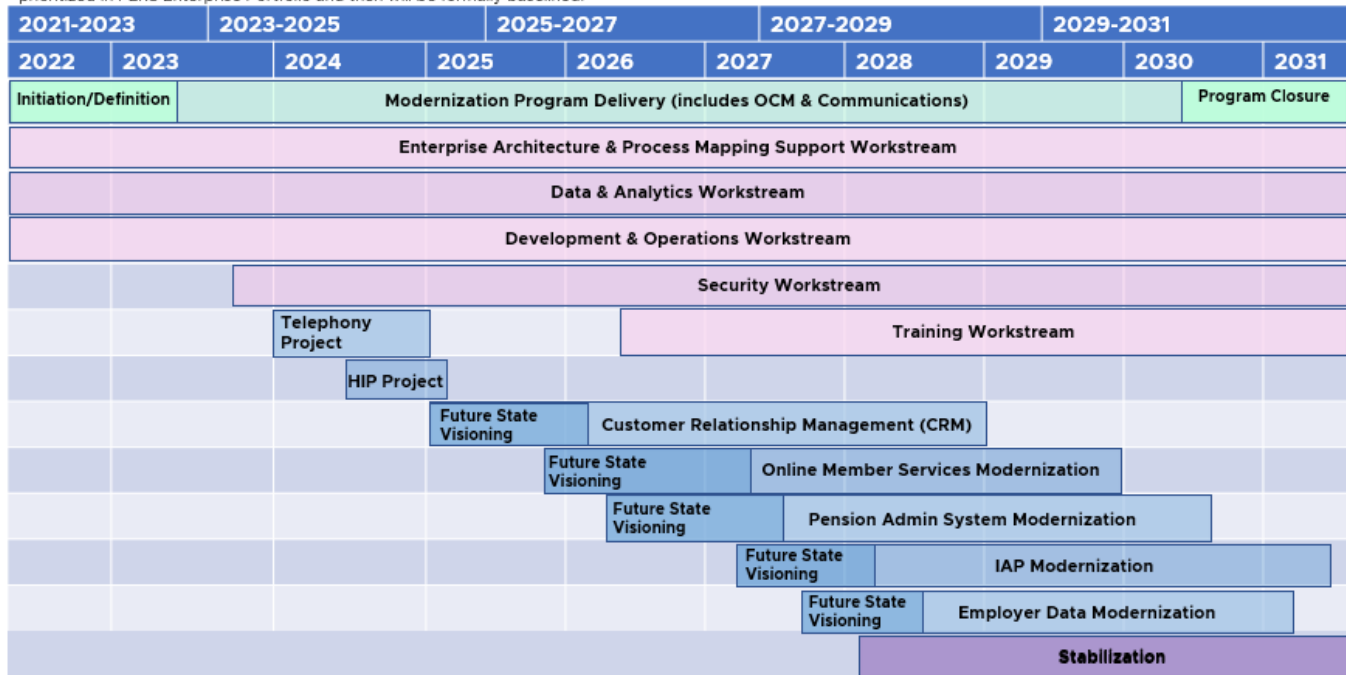
PROTECT MEMBER DATA — Ensure the confidentiality, integrity, availability and privacy of member and employer data are protected.

Modernization Program benefits

Increase ⬆	Reduce ⬇	Improve ➕
Satisfaction with PERS services.	Annual escalations received.	Data accuracy.
PERS staff engagement.	Manual calculations and processes.	Confidence in PERS technologies, applications, tools, and data.
Staff technical skills.	Retirement application processing time.	Majority of service offerings available in integrated system.
Sustainable partnerships, platforms, and applications.	Annual pension administration costs per member.	
	Data and identity fraud risks.	

Modernization Program roadmap

Note that this timeline is an estimation and should not be considered a project schedule. A project schedule is developed after projects and resources are approved and prioritized in PERS Enterprise Portfolio and then will be formally baselined.

2021-2023		2023-2025		2025-2027		2027-2029		2029-2031		
2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	

Roadmap rows:
- Initiation/Definition — Modernization Program Delivery (includes OCM & Communications) — Program Closure
- Enterprise Architecture & Process Mapping Support Workstream
- Data & Analytics Workstream
- Development & Operations Workstream
- Security Workstream
- Telephony Project
- Training Workstream
- HIP Project
- Future State Visioning — Customer Relationship Management (CRM)
- Future State Visioning — Online Member Services Modernization
- Future State Visioning — Pension Admin System Modernization
- Future State Visioning — IAP Modernization
- Future State Visioning — Employer Data Modernization
- Stabilization

Appendix A. Project tracking

ISD uses two primary working documents to guide, track, and report on IT projects: the tracking worksheet and the roadmap.

The ITSP tracking worksheet

ISD uses various weighting factors to calculate an overall score for each project, providing a priority order used to decide which projects are evaluated and resourced first. It also provides high-level tracking. This is a dynamic tool that is updated as projects are completed or added and as agency or IT needs change.

Score	Priority	Program/project name	Driven by	Status	Start date	End date
289.0	High	Technology Upgrade (jClarety Technical Stack)	PERS Strategic Plan	In process	6/1/2022	6/30/2025
286.0	High	SB 1049 Implementation	External mandate	In process	7/1/2019	6/30/2025
283.0	High	PERS Modernization	PERS Strategic Plan	In process	7/1/2023	6/30/2031
270.0	High	Enterprise Management System (EMS)	External mandate	In process	7/1/2023	3/8/2024
267.0	High	SOS Audit Remediation	PERS Strategic Plan	In process	3/15/2022	6/30/2025
183.0	High	Infrastructure Refresh	IT foundational	In process	11/4/2023	12/31/2024
161.0	High	Outage Remediation	IT foundational	In process	12/1/2023	3/29/2024
67.0	High	MIAM	Security	In process	7/1/2023	6/30/2025
48.0	High	Azure Governance	ISD project	In process	1/22/2024	12/31/2024
38.0	High	IT Asset Management	TOS initiative	In process	11/1/2023	12/31/2024
186.0	Medium	Financial Edge upgrade	IT foundational	In process	1/3/2024	12/31/2024
58.0	Medium	ITSM Audit Remediation	Internal audit	In process	7/11/2023	6/30/2025
57.0	Medium	Workforce Development	IT Strategic Plan	In process	7/1/2019	Ongoing
56.0	Medium	PowerApps Deployment	IT Strategic Plan	In process	9/6/2021	6/30/2024

The IT roadmap

ISD's IT roadmap shows in-process IT projects, including the PERS Modernization Program. The chart offers a visual representation of the projects and programs on which ISD is working from 2023 to 2028.

Program/project name	2023		2024		2025		2026		2027		2028	
	JAN - JUN	JUL - DEC	JAN - JUN	JUL - DEC	JAN - JUN	JUL - DEC	JAN - JUN	JUL - DEC	JAN - JUN	JUL - DEC	JAN - JUN	JUL - DEC
Workforce Development						Ongoing						
SB 1049 Implementation		7/1/2019 – 6/30/2025										
SOS Audit Remediation		3/15/2022 – 6/30/2025										
jClarety Technical Stack Upgrade		6/1/2022 – 6/30/2025										
PERS Modernization Program				7/1/2023 – 6/30/2031								
Enterprise Management System (EMS)	7/1/2023 – 3/8/2024											
Member Identification Access Management (MIAM)		7/1/2023 – 6/30/2025										
Information Technology Service Management (ITSM) Audit Remediation		7/11/2023 – 6/30/2025										
IT Asset Management		11/1/2023 – 12/31/2024										
Infrastructure Refresh Project		11/4/2023 – 12/31/2024										
Outage Remediation		12/1/2023 – 3/29/2024										
Financial Edge Upgrade		1/3/2024 – 12/31/2024										
Azure Governance		1/22/2024 – 12/31/2024										

Appendix B. Alignment with legislative KPMs, EIS framework, and POBMS

Alignment with legislative key performance measures (KPM)

The Oregon Legislature has established and approved KPMs for all state agencies to monitor the quality and value of the specific services they deliver.

PERS program operations have a significant impact on Oregon's economy. About 10% of Oregonians directly participate in PERS retirement plans and many more are family members and/or beneficiaries of those participants. Therefore, it is important for PERS to deliver high-quality and cost-efficient services.

The PERS ITSP includes IT requirements that PERS must meet in order to satisfy the KPMs. The IT requirements indirectly affect the following five of the eight KPMs (affected KPMs indicated with **bold red**).

KPM 1 — Timely retirement payments: Percentage of initial service retirements paid within 45 days from retirement date.

KPM 2 — Total benefit administration costs: Total benefit administration costs per member.

KPM 3 — Member-to-staff ratio: Ratio of members to FTE staff.

KPM 4 — Accurate benefit calculations: Percent of service retirement monthly benefits accurately calculated to within $5 per month.

KPM 5 — Level of participation: Percent of state employees participating in the deferred-compensation program.

KPM 6 — Customer service: Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent." Includes overall customer service, timeliness, accuracy, helpfulness, expertise, and availability of information.

KPM 7 — Timely benefit estimates: Percent of benefit estimates processed within 30 days.

KPM 8 — Board of Director's best practices: Percent of total best practices criteria met by the PERS Board.

The relevant Legislative KPMs (1, 2, 4, 6, and 7) are most supported by the ITSP goal of **improved IT efficiency and responsiveness to changes**.

Alignment with 2023–2026 Enterprise Information Services (EIS) Strategic Framework

The following table shows the ITSP goals and objectives that directly or indirectly support the relevant "2023–2026 EIS Strategic Framework" objectives.

EIS Strategic Framework objectives	PERS ITSP outcomes
Objective 1 – Deliver Service Excellence Enable service flexibility and improve resiliency and mature statewide emergency communications interoperability and resilience.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes.
Objective 2 – Mature Project Transparency and Accountability Reinforce the adoption and application of formal project management principles, standards, and emerging best practices that support accountability and value delivery on behalf of people in Oregon. Strengthen service integration and policy area coordination within EIS to support IT investment maturity and alignment with enterprise standards, strategies, and architecture — accelerating cloud adoption, the use of data as a strategic asset, and digital transformation.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes.
Objective 3 – Mature Statewide Cloud Strategy and Brokerage Service Provide a framework to guide agency adoptions to enterprise cloud infrastructure and platform services and establish a Network and Security Modernization Program.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes.

Continued

EIS strategic framework objectives	PERS ITSP outcomes
Objective 4 – Mature Oregon's Data Governance Advance the state of Oregon's enterprise data leadership, data policy and research, program and performance management, data delivery, and open data and transparency.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes. **Focus Area 2 Goal** Improve the workforce environment to prepare for and attract the next generation of technical talent.
Objective 5 — Improve Oregon's Cybersecurity Posture Advance the state of Oregon's mission through the collaborative development and adoption of enterprisewide cybersecurity policies matched by prioritized risk management–based implementation of cybersecurity defenses.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes.
Objective 6 — Mature Legacy System Modernization Strategy Ensure policy-area and agency modernization plans align with enterprise strategies, architecture, and emerging IT standards, and develop a high-level model and approach for architecture development to support planning for major modernization initiatives.	**Focus Area 1 Goal** Improve IT efficiency and responsiveness to business operational changes. **Focus Area 2 Goal** Improve the workforce environment to prepare for and attract the next generation of technical talent.

Supporting PERS Outcome-Based Management System (POBMS)

ISD's current work maps to the POBMS to ensure our work supports agency goals. Most of our work supports POBMS Supporting Process (SP) 3.

SP3: Providing information technology

SP3-1 **Capturing and maintaining enterprise architecture.**

Objective 1.1 ORION core applications are rearchitected as independent, discrete business services.

SP3-2 **Developing IT strategies to meet agency technology needs.**

GOAL Improved IT efficiency and responsiveness to business operational changes.

Objective 1.1 ORION core applications are rearchitected as independent, discrete business services.

Tactic 1.1.1: Resolve key issues affecting ORION administration, performance, maintainability, and sustainability to support PERS Modernization Program.

Tactic 1.1.4: Create an application-programming interface (API) ecosystem to allow ORION to loosely integrate between applications, commercial off-the-shelf (COTS) solutions, and external services.

Tactic 1.1.5: Analyze opportunities to leverage COTS solutions when beneficial to the agency.

Tactic 1.1.6: Redesign current infrastructure to use Hybrid Cloud (on the premises and in the cloud).

SP3-3 **Ensuring system availability and performance.**

GOAL Improved IT efficiency and responsiveness to business operational changes.

Objective 1.1: Rearchitect ORION core applications as independent, discrete business services.

> **Tactic 1.1.2**: Restructure and improve nightly jClarety batch processes for better maintainability, increased efficiency, and shorter batch duration.
>
> **Tactic 1.1.3**: Redesign jClarety batch processes and other ORION core applications to improve supportability, logging, monitoring, and error-handling functionality.

SP3-4 **Providing technical support services.**

GOAL Improved IT efficiency and responsiveness to business operational changes.

Objective 1.1 Rearchitect ORION core applications as independent, discrete business services.

> **Tactic 1.1.1**: Resolve key issues affecting ORION administration, performance, maintainability, and sustainability to support PERS Modernization Program.
>
> **Tactic 1.1.2**: Restructure and improve nightly jClarety batch processes for better maintainability, increased efficiency, and shorter batch durations.
>
> **Tactic 1.1.3**: Redesign jClarety batch processes and other ORION core applications to improve supportability, logging, monitoring, and error-handling functionality.

SP3-5 **Maintaining and enhancing applications and systems.**

GOAL IT efficiency and responsiveness to business operational changes is improved.

Objective 1.1 Rearchitect ORION core applications as independent, discrete business services.

> **Tactic 1.1.1**: Resolve key issues affecting ORION administration, performance, maintainability, and sustainability to support PERS Modernization Program.

SP3-6 Implementing new applications and systems.

GOAL Improved IT efficiency and responsiveness to business operational changes.

Objective 1.1 Rearchitect ORION core applications as independent, discrete business services.

Tactic 1.1.1: Resolve key issues affecting ORION administration, performance, maintainability, and sustainability to support PERS Modernization Program.

Tactic 1.1.4: Create an application-programming interface (API) ecosystem to allow ORION to loosely integrate between applications, commercial off-the-shelf (COTS) solutions, and external services.

Tactic 1.1.5: Analyze opportunities to leverage COTS solutions when beneficial to the agency.

Tactic 1.1.6: Redesign current infrastructure to use Hybrid Cloud (on the premises and in the cloud).

SP3-7 Implementing and maintaining system security

GOAL Improved IT efficiency and responsiveness to business operational changes.

Objective 1.1 Rearchitect ORION core applications as independent, discrete business services.

Tactic 1.1.6: Redesign current infrastructure to use Hybrid Cloud (on the premises and in the cloud).