PRISM
Public Retirement Information Systems Management

The Pursuit of Better…

Better Processes, Better Technology, Better Pensions

2019
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**Annual Conference
May 12-15**

PRISM
Public Retirement Information Systems Management

2019 Annual Conference

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PRISM - 2019 Conference: "The Pursuit of Better… Better Processes, Better Technology, Better Pensions"

May 12 - 15, 2019
JW Marriott Indianapolis

Saturday, May 11th		
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1:00 - 5:00	Completion of Board Assignments	Room 106
Sunday, May 12th		
2:00 - 5:00	Registration	White River E-F Foyer
4:30 - 5:00	New Member Orientation	White River A
4:30 - 5:00	Meeting with Sponsors	White River B
6:00 - 9:00	Welcome Reception at JW Marriott	White River A-E
Monday, May 13th		
7:00 - 8:00	**Breakfast**	White River G-J
8:00 - 8:25	President's Welcome and President-Elect's Introduction	White River E
8:25 - 9:40	STEVE RIZZO Keynote "The Attitude Adjuster"	White River E
9:40 - 9:50	**Break**	White River F
9:50 - 10:50	Breakout "It's Not A Matter of If, But When…Cybersecurity Best Practices" CALPERS	White River A-B
	Breakout "Embracing Change Top Down" ILLINOIS MUNICIPAL	White River C-D
	Breakout "Changing Everything, Revving Up For A Better MainePERS" MAINE PERS	Room 101/2
10:50 - 11:00	**Break**	White River F
11:00 - 12:00	Breakout "It's Not A Matter of If, But When…Cybersecurity Best Practices" CALPERS	White River A-B
	Breakout "Embracing Change Top Down" ILLINOIS MUNICIPAL	White River C-D
	Breakout "Changing Everything, Revving Up For A Better MainePERS" MAINE PERS	Room 101/2
12:00 - 1:00	**LUNCH**	White River G-J
1:00 - 4:00	Member Roundtable and Sponsor Introductions	White River E
3:45 - 4:50	**Break with Snacks**	White River F
4:00 - 4:50	Sponsor and Member Consultations	White River F
End of Sessions		
5:15 - 5:30	Meet for 5:30 Departure	Bus Entrance, rear of hotel
6:00 - 10:00	Dinner / Networking Event	
8:15 - 10:15	Busses shuttle to hotel (continuous)	

PRISM - 2019 Conference: "The Pursuit of Better… Better Processes, Better Technology, Better Pensions"
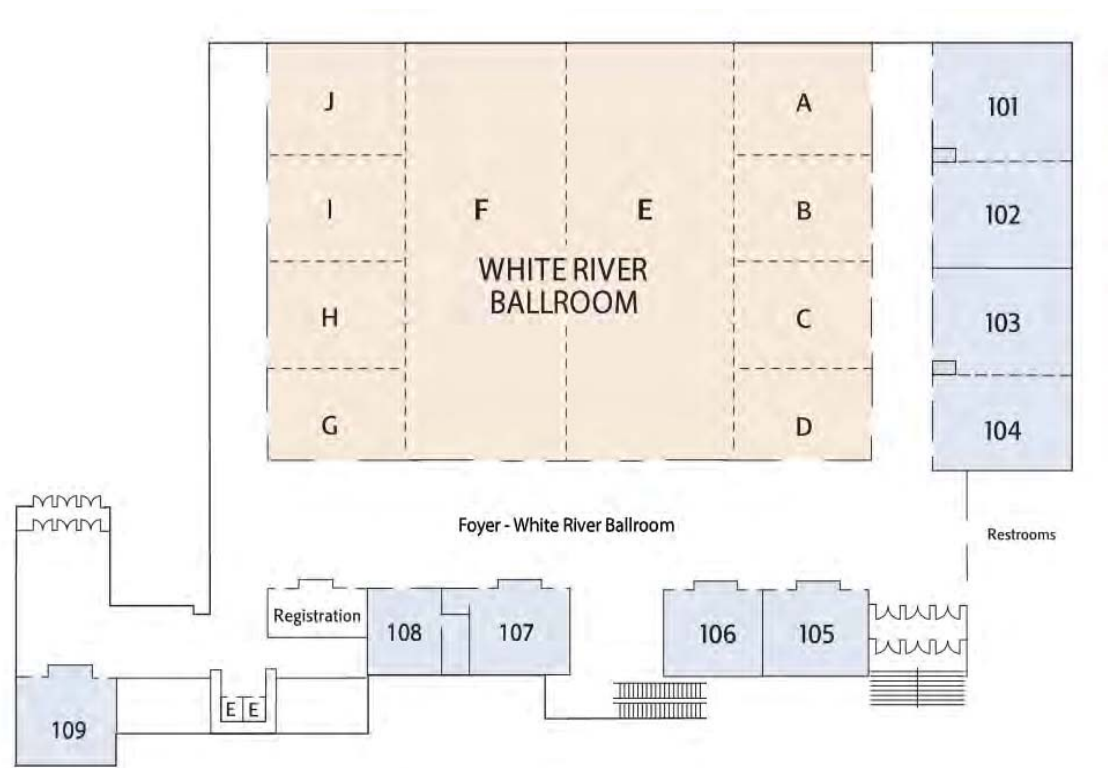
May 12 - 15, 2019
JW Marriott Indianapolis

Tuesday, May 14th

Time	Session	Location
7:15 - 8:15	**Breakfast**	White River G-J
8:15 - 9:30	SETH MATTISON Keynote "Leading Personal & Informational Transformation"	White River E
9:30 - 9:45	**Break**	White River F
9:45 - 10:45	Breakout "Build Process in Preparation for the Next Generation of IT" CALPERS	White River A-B
	Breakout "A new ERA…..Legacy System Replacement Lessons Learned" WASHINGTON DRS	White River C-D
	Breakout Panel Discussion on Fraud & Breach Incidents	Room 101/2
10:45 - 11:00	**Break**	White River F
11:00 - 12:00	Breakout "Build Process in Preparation for the Next Generation of IT" CALPERS	White River A-B
	Breakout "A new ERA…..Legacy System Replacement Lessons Learned" WASHINGTON DRS	White River C-D
	Breakout "Continual Service Improvement" TRSNYC	Room 101/2
12:00 - 1:00	**Lunch**	White River G-J
1:00 - 2:00	Breakout "Agile vs Waterfall" Texas Teachers	White River A-B
	Breakout "Implementing Scrum in Agile Software Development" Missouri (PSRS/PEERS)	White River C-D
	Breakout "Continual Service Improvement" TRSNYC	Room 101/2
2:00 - 2:15	**Break**	White River F
2:15 - 3:15	Breakout "Agile vs Waterfall" Texas Teachers	White River A-B
	Breakout "Implementing Scrum in Agile Software Development" Missouri (PSRS/PEERS)	White River C-D
	Breakout "Positive Results from our Next Generation Pension Solution" Baltimore Fire & Police	Room 101/2
	End of Sessions	
3:30 - 4:30	Member Business Meeting and Officer Elections	White River E
5:30 - 5:45	Meet for 5:45 Departure	Hotel Lobby
6:00 - 9:30	Dinner / Networking Event	
8:15 - 9:45	Busses shuttle to hotel (continuous)	

PRISM - 2019 Conference: "The Pursuit of Better… Better Processes, Better Technology, Better Pensions"		
May 12 - 15, 2019 JW Marriott Indianapolis		
Wednesday, May 15th		
8:00 - 9:15	**Breakfast**	White River E
9:15 - 10:30	Breakout "Viewing Retirement Through a Digital PRISM" LASERS	White River A-B
9:15 - 10:30	Breakout "Pension Operations Transformation – Strategy and Decisions" Maryland St Ret	White River C-D
9:15 - 10:30	Breakout "Positive Results from our Next Generation Pension Solution" Baltimore Fire & Police	Room 101/2
10:30 - 10:45	**Break**	White River E-F Foyer
10:45 - 12:00	Breakout "Viewing Retirement Through a Digital PRISM" LASERS	White River A-B
10:45 - 12:00	Breakout "Pension Operations Transformation – Strategy and Decisions" Maryland St Ret	White River C-D
10:45 - 12:00	Breakout Panel Discussion on Mobile App Development	Room 101/2
12:00 - 1:00	**Lunch**	White River E
"Birds of a Feather" Sessions		
1:00 - 1:55	Small Breakout #1 Data Security/Physical Security	Room 101
	Small Breakout #2 Cloud Lessons Learned	Room 102
	Small Breakout #3 Disaster Recovery/Business Continuity	White River C
	Small Breakout #4 Methodology (Agile/Kanban/Scrum/Waterfall)	White River D
1:55 - 2:05	**Break**	
2:05 - 3:00	Small Breakout #1 Fraud and Breach Discussion	Room 101
	Small Breakout #2 Business Intelligence	Room 102
	Small Breakout #3 Telecommuting/Work from Home Concepts	White River C
	Small Breakout #4 Telephony (VOIP/SIP)/Customer Service (CRM) etc.	White River D
3:00	**Conference Concludes**	
3:00 - 6:00	**Board of Directors Meeting**	Room 105
Thursday, May 16th		
8:00 - 12:00	Board of Directors Meeting	Room 105

JW Marriot Meeting Space Floor plan

White River Conference Level

PRISM
Public Retirement Information Systems Management

◀ **Officers 2018-2019**

President
Ira Greenstein
Maryland State Retirement and
Pension System
(410) 625-5547
igreenstein@sra.state.md.us

President-Elect
Dan Bowden
Louisiana State Employees'
Retirement System
(225) 922-2565
dbowden@lasersonline.org

Secretary
Doug Hislop
South Carolina Public Employee
Benefit Authority
(803) 737-6818
dhislop@peba.sc.gov

Treasurer
Joseph Schaefer
Kansas City Public School
Retirement System
(816) 472-5800
joe.schaefer@kcpsrs.org

President Emeritus
Patrick Grandahl
Minnesota Teachers Retirement
Association
(651) 296-0460
pgrandahl@minnesotatra.org

◀ **Directors**
Western District
Esther Cheung Hill
University of California
Retirement System
(510) 987-0309
esther.cheung@ucop.edu

Southern District
Chris Cutler
Teacher Retirement System of
Texas
(512) 542-6234
chris.cutler@trs.texas.gov

Central District
Jamie Houk
Missouri Local Government
Employees Retirement System
(573) 632-6354
jhouk@molagers.org

Northeast District
Michael Gregoire
New York State Teachers'
Retirement System
(518) 447-2932
Michael.Gregoire@nystrs.org

Dear Members, Sponsors and Guests,

On behalf of the entire PRISM Board of Directors, welcome to PRISM 2019! We are excited that you are here and thank you for your continued support of the PRISM Association.

The theme for this year's Conference is "The Pursuit of Better … Better Processes, Better Technology, Better Pensions." It is a universal theme for our membership, with a long-term focus. Conference breakouts complement the theme, bringing practical ideas and real-world experience to attendees.

The format for this year's Conference is similar to past conferences, with two keynote speakers and the always popular member breakout sessions. In addition, the Conference will provide attendees with numerous networking opportunities, including at the Sunday Welcome Reception, and Monday & Tuesday dinner networking events. The informal networking opportunities and interactions between both members and sponsors is what make the PRISM Conference so unique and successful, year after year.

On Monday morning, our keynote speaker is Steve Rizzo, who will speak on the topic "Don't Just Accept Change, Embrace It!". Steve is a well-known motivational speaker, author, and former stand-up comedian, who will kick off the Conference using laughter as a guide, challenging us to adopt a new way of thinking to discover increased productivity, greater enthusiasm, and new levels of success.

On Tuesday morning, keynote speaker Seth Mattison will alert us to "Future Forces: Digital Forces Shaping the New World of Work." Seth is an expert and author on workforce trends, generational dynamics, and business strategy. As Co-Founder and Chief Movement Officer of Luminate Labs, Seth tracks and communicates key shifts in talent management, change and innovation, leadership, and the future of work.

During the breakout sessions presented throughout the Conference, volunteer PRISM members will share their knowledge and experiences on current projects and technologies they have recently implemented or are currently working on at their respective systems. As you attend these breakouts, take a moment to think of what value YOUR experiences would have for others, and begin to plan what YOU can present at PRISM 2020.

The Member Roundtable and Sponsor Introductions session on Monday afternoon gives each member system and sponsor company a brief time to provide an update about their system or company. Members will have the opportunity to mention their current projects, recently completed projects and projects being planned. This is a good time for members to mention information they are seeking from others during the Conference. Sponsors will

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Webmaster: Scott Thompson
Municipal Employees Retirement System of Michigan
sthompson@mersofmich.com

have the opportunity to introduce themselves and mention the services and product offerings they provide.

The Member and Sponsor Consultations will follow immediately after the Member Roundtable and Sponsor Introductions session. During this time block, members will have the opportunity to visit all of the PRISM sponsors to learn more about their service and product offerings in greater detail, or just to talk about our public pension industry. The PRISM Association is fortunate to have sponsors that understand our business and contribute to our members' success. Thank you, sponsors, for all of your support! As an added incentive to visit the Sponsors, <u>we will have a photographer available in the Exhibit area to take complimentary "head shots" of attendees</u>.

The annual member Business Meeting will be held after the final breakout session on Tuesday afternoon. At this meeting, members will elect Board positions that are up for election. Note that only members are allowed to attend the Business Meeting, with each fund having a single vote for each position. The Treasurer will report, and we'll cover plans for the 2020 conference.

The "Birds of a Feather" sessions on Wednesday afternoon are informal discussion groups where attendees group together based on a shared interest (topic) and carry out a discussion without any pre-planned agenda. These sessions are additional valuable chances to learn from each other.

On behalf of the entire PRISM Board of Directors, thank you for being a part of PRISM 2019. Ladies and gentlemen, start your engines!

Sincerely,

Ira R. Greenstein
PRISM President

www.prism-assoc.org
Webmaster: Scott Thompson
Municipal Employees Retirement System of Michigan
sthompson@mersofmich.com

Section 2:

Speakers, Break-outs, & Birds-of-a-Feather Sessions

Keynote

Steve Rizzo

The Attitude Adjuster

Steve Rizzo is the Attitude Adjuster. You can't attend one of his keynote speeches, seminars, or read his books and leave with the same attitude. He's a personal development expert, comedian, motivational speaker and author. His popular PBS special brought him into millions of homes. It's no surprise that he's been inducted into the Speakers Hall of Fame, an honor bestowed upon fewer than 200 speakers worldwide since 1977.

Perhaps one of Steve's greatest achievements was the stellar degree of success he achieved as a comedian, being chosen as a Showtime Comedy All-Star and sharing the stage with Jerry Seinfeld, Rodney Dangerfield, Eddie Murphy, Ellen DeGeneres and many more giants of comedy.

Of course, the surprises don't stop there. What was next for this funny guy in the prime of his career? For Steve, it was to trade the standing ovations as a stand-up comedian for maximum fulfillment and, well, more standing ovations as a hall of fame speaker. What Steve brings to the table is his captivating ability to engage the attendees with laughter as he challenges them to shift their focus and way of thinking to discover greater enthusiasm, increased productivity and new levels of success.

Steve is the author of the bestselling books *Motivate THIS!* and *Get Your SHIFT Together,* and is often called upon as the **"go-to" guy on the topic of personal development** for many network, cable and radio media outlets. His **immensely popular PBS special brought him into millions of homes** and revealed why he's an expert on Attitude, Humor and the Power of Positive Thinking.

Keynote

Seth Mattison

<u>Leading Personal & Institutional Transformation</u>
"Ignite the Light Within: Shining a Light on the Way We Work, Lead, Live, and Love"

Seth Mattison is an Internationally renowned workforce strategist, management trendspotter, and author on workforce trends, generational dynamics, and business strategy. As Co-Founder and Chief Movement Officer of Luminate Labs, Seth advises many of the world's leading brands and organizations on the key shifts happening around talent management, change and innovation, leadership, and the future of work.

In his co-authored book "The War at Work," Seth addresses the challenges of performing in a half-changed world. Through his fable, Seth guides businesses leaders juggling between the disruptive movements in the market and entrenched, unwritten norms.

His ideas have been featured in such publications as The Wall St. Journal, Forbes, The Huffington Post, and The Globe and Mail and was recently named to the Editors' Picks for Speakers to Watch in 2017.

For the past decade Seth has shared his insights with thousands of business leaders around the world and has received accolades from many of the world's best brands including: MasterCard, Johnson and Johnson, Microsoft, Kraft Foods, AT&T, PepsiCo, GE Energy, Cisco, State Farm, Merrill Lynch, Dow, and Disney.

It's Not a Matter of If, But When: Cybersecurity Best Practices

Monday, May 13, 2019
9:50 – 10:50 and 11:00 – 12:00
Room: White River A-B

Session Description

The threat landscape continues to evolve with cyberattacks now regarded as inevitable. Industry experts say it's not a matter of if, but when a breach will occur. Cyberattacks come from organized, sophisticated criminal groups looking to steal valuable data or cause reputational harm. How do you keep your constituents' safe from cyber criminals? In this session, the CalPERS Chief Information Officer will share industry best practices and operational strategies for managing cybersecurity including security frameworks, partnerships, response and preparedness measures, and how to foster a "cyber warrior" culture in your organization.

Speaker Biographies

Christian Farland
Chief Information Officer
California Public Employees' Retirement System

Christian Farland joined CalPERS in 2002 and was named Chief Information Officer in February 2018. He manages the administration and direction of CalPERS' information technology (IT) services, strategy, and security, and provides leadership and counsel to the board and executive team. Christian's duties include overseeing the 600-member information technology team, as well as the technology portfolio that makes up CalPERS' $100 million IT budget. He previously served in a number of leadership capacities at CalPERS, including chief technology business officer; interim chief for the Technology & Strategic Services Division; chief of IT Performance and Accountability; and enterprise transition management project manager for CalPERS' transformation initiative for five years.

Embracing Change Top Down

Monday, May 13, 2019
9:50 – 10:50 and 11:00 – 12:00
Room: White River C-D

Session Description

Accepting change is not easy. We commonly experience management expecting staff to accept change without much buy-in from the top. At IMRF the Executive Steering Committee supported by our Board of Trustees have help staff adapt to change by setting the examples.

IMRF is going through a transition quite common in the public pension administration area, going from a custom-built system to a Commercial off the shelf (COTS) product. The fear of losing customized functionality had been the main impediment for IMRF staff to accept change.

Defining a governance structure and providing clear strategic guidelines to Business Process Owners, core teams, and project participants have allowed IMRF staff to adapt and own decisions made regarding how to use 'out of the box' functionality from a COTS product and still achieve the same level of customer service we provide today.

IMRF is reinventing our customer service delivery model to adapt to the benefits of a COTS product… come to this presentation to learn more about our journey.

Speaker Biographies

Keyla Vivas
Chief Information Services Officer
Illinois Municipal Retirement Fund

Keyla is the sponsor of the Horizon Project at IMRF. She has 32 years of experience designing, developing and implementing business solutions for different industries, such as iron mining (SIDOR) and aluminum (CVG Interalúmina) in Venezuela and public pension administration at IMRF (98 – now). Since 2016 Keyla has held the CISO position at IMRF. Keyla is a member of the Executive Steering Committee at IMRF responsible for overseeing the implementation of a Modernization program that started in 2011. Keyla has a BA in Management with a concentration on IT Management.

<u>Changing Everything: Revving Up For A Better MainePERS</u>

Monday, May 13, 2019
9:50 – 10:50 and 11:00 – 12:00
Room: 101-102

<u>Session Description</u>

Learn what happens when an organization decides to change managed IT service providers, telephone system support vendors, carriers, and oh by the way, its building - all at the same time. In 2018 MainePERS undertook multiple concurrent strategic projects, culminating with a relocation of the entire business to a new address over a three-day weekend. Please join us to hear about our challenges and, ultimately, successes.

<u>Speaker Biographies</u>

John Mavodones

Network and Operations Supervisor

Maine Public Employees Retirement System

John Mavodones has worked at MainePERS since 1997 and is currently the Network and Operations Supervisor in Information Technology. In those 22 years, John has been part of various technology initiatives and upgrades including the implementation of a new line of line of business system, creation of a disaster recovery site and server replication process, migration to a server virtualization platform and participating in the facility relocation project within the past year. John has been attending PRISM since Portland in 2009.

Douglas Butler

Information Technology Manager

Maine Public Employees Retirement System

Doug has been with MainePERS in the role of IT Manager since 2017. Prior to working in the public sector, Doug worked for over 25 years in IT and technical operations in the horse racing and casino gaming industries. His academic background is in Electrical and Computer Engineering. Professional interests are in IT Infrastructure and Operations and IT Service Management.

Build Process in Preparation of the next generation of IT

Tuesday, May 14, 2019
9:45 – 10:45 and 11:00 – 12:00
Room: White River A-B

Session Description

It's likely we're all familiar with the challenges of having siloed technical teams, which can slow down processes and create roadblocks in our work. CalPERS has been working in recent years to improve back-office processes to solve this problem. This presentation will explain how we built our Business Relationship Team and how this all comes together to deliver true Service Level Agreements that are completed collaboratively across the CalPERS enterprise. We'll also lay out how this has increased our customer satisfaction and prepared CalPERS for technical challenges on the horizon.

Speaker Biographies

Andrew Warren
Chief Technology Officer/Interim Chief Security Officer
CalPERS

Andrew has been at CalPERS since 2006. During his tenure, he's led several efforts in IT Service Management, Infrastructure Modernization, and Security Governance. In addition to his work in IT, Andrew has presented at several Gartner conferences on topics from DevOps to managing your MSSP. He is currently sponsoring several projects to move CalPERS technology from onsite to the cloud.

A new ERA…..Legacy System Replacement Lessons Learned

Tuesday, May 14, 2019
9:45 – 10:45 and 11:00 – 12:00
Room: White River C-D

Session Description

In 2016, after years of planning and preparation, Washington State Department of Retirement Systems (DRS) began the implementation of a new Employer Reporting Application (ERA).   ERA provides all our employer partners with a more effective system to report employee retirement information to us. Improvements included:

1) A user-friendly web portal that presents all data in one easy-to-navigate location

2) The ability to edit and validate employment data before submitting it—this increases the accuracy of information provided to us, and reduces corrections

3) Enhanced on-demand tools for self-auditing—reporting the right positions in the right plans increases accuracy

This presentation will cover our lessons learned from implementing our first legacy system replacement and how we are applying them to our projects moving forward. You will hear from a variety of team members including project managers, web services and infrastructure support, and the business team.

Speaker Biographies

The team below from the Washington State Department of Retirement Systems (DRS) led the implementation of the ERA project.

Lisa Horne, Project Manager

Sue Gordon, Technical Project Manager

Jennifer Freeze, Project Coordinator

Jay Walsh, Information Technology Services Manager

Isaac Kirkwood, Web Programmer Team Lead

Amy McMahan, Project Management Office Director

Panel Discussion: Fraud, Breach & Compromise Events
Tuesday, May 14th 2019
9:45 am - 10:45 am
Room 101/102

Session Description

The safety and security of Personally Identifiable Information (PII) and the connected monies in our members' pension accounts is, in many ways, the front line of our ongoing war against fraud, breach, and compromise events. Creating and maintaining a safe and secure system while cultivating a culture of awareness and prevention remains a primary responsibility of the information management professional. When a fraud, breach or compromise event happens, it immediately becomes a crisis for our organizations, and yet it also provides an opportunity for growth and improvement in this critical area.

What are some strategies to be considered when recovering from such an event? What are some options to improve detection, prevention and remediation practices? This panel discussion will allow PRISM attendees to learn from the panelists' experiences and openly discuss concepts and perspectives toward better securing pension fund organizations' information and systems.

Panelists

Greg Taylor
Chief Information Officer
State Teachers Retirement System of Ohio

Meg Skelley
Organizational Support Director
Michigan Office of Retirement Services

Maxx Godsey
Deputy Chief Information Officer
Iowa Public Employees' Retirement System

Continual Service Improvement – TRSNYC

Tuesday, May 14, 2019
11:00 am – 12:00 pm and 1:00 pm – 2:00 pm
Room: 101-102

Session Description

In 2017 the Teachers' Retirement System of the City of New York (TRSNYC) hired an IT Service Management Officer (SMO) and started the Continual Service Improvement Program (CSIP), as one component of our larger IT Service Management Program. The aim was to create a culture where the effectiveness and efficiency of IT processes and services are continually assessed and improved. This program spans the entire gamut of IT processes and services, from the simplest to more complex ones. This presentation will give some insight as to how TRSNYC tackled this effort. You will hear from some TRSNYC associates as what they think Continual Service Improvement is, see some of steps and progress, and hear about some of the challenges we faced.

Speaker Biography

Billy Demas
Deputy Director IT Services Administration
Teacher Retirement System of the City of New York

Billy has been with TRS for over 25 years and has served in the title of Network Manager, Deputy Director of Infrastructure and is currently Deputy Director IT Services Administration

Waterfall and Agile – Is it a Volatile Mixture?

Tuesday, May 14, 2019
1:00 pm -2:00 pm & 2:15 pm – 3:15 pm
White River A-B

Session Description

In 2013, Teachers Retirement System (TRS) of Texas started their Pension Administration System (PAS) replacement/modernization program called TEAM (TRS Enterprise Application Modernization) with the selection of a PAS vendor. As part of the TEAM Program, TRS is modernizing its pension systems, health insurance systems, implementing a new customer relationship management and workflow solution, and integrating all of these components together. The TEAM program is a multi-year two phased program. Active membership and employer reporting were implemented in Phase 1 and annuitants and self-service will be implemented in Phase 2.

This presentation covers how TRS worked with this sometimes volatile mixture of integrating TRS agile development efforts with the more waterfall-like methodology used by our PAS implementation vendor, Perspecta. We will discuss how we weaved together user stories and sprints that the Agile methodology requires, along with the requirements and milestones the Iterative Waterfall methodology depends upon. The presentation will also cover the tools and processes used to manage and integrate these efforts, discuss the value of a scrum of scrums with multiple teams, and talk about the challenges we encountered and lessons learned.

Speaker Biographies

Christi Holman
Director of Information Systems Support and Development Team
Teacher Retirement System (TRS) of Texas

Christi is the Director of Information Systems Support and Development that consists of 30+ staff and contractors. She leads the Application Support and Data & Reporting Services teams. She has worked at TRS for 10 years. Christi is also serving as the Technical Project Sponsor for the Health Insurance Line of Business (HILOB) project which is part of the Pension Administration System (PAS) replacement/modernization program called TEAM. The HILOB application is using the Agile methodology. HILOB is being developed to work closely with the Pension Line of Business (LOB) development project which uses the Waterfall methodology. The HILOB project is one of three Agile projects currently underway at TRS.

Implementing Scrum in Agile Software Development

Tuesday May 14th, 2019

1:00 pm – 2:00 pm & 2:15 pm – 3:15 pm

White River C-D

Session Description

In 2016, the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS) began searching for a different approach and lifecycle for software development. After much research, it was determined that implementing Scrum, an Agile software development approach, would best fit our needs at PSRS/PEERS. During this breakout session, we will share information about Scrum and how we have implemented Scrum in our own software development lifecycle. We will share our successes, lessons learned, and how your organization may also benefit from this approach. This topic can apply to organizations that have their own development staff or to those that utilize contractors for their development processes.

Speaker Biographies

Bill Betts, Chief Technology Officer
Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)

Bill has over 20 years of IT experience. Bill started his career as an Applications Developer for the Missouri Department of Transportation (MoDOT) before becoming the Applications Development Supervisor. After leaving MoDOT, Bill served as the Director of Information Technology for the City of Jefferson in Missouri for 10 years. In 2015, Bill became the Chief Technology Officer for PSRS/PEERS.

Bill has a Bachelor of Science degree in Computer Information Systems from Lincoln University, in Jefferson City, Missouri. Bill also earned his Project Management Professional (PMP) certification from the Project Management Institute (PMI) in 2005.

Ciara Bauer, Project Manager
Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)

Ciara has worked at PSRS/PEERS since 2016 and is currently a Project Manager in the Information Technology department. She also serves in the role of Scrum Master for the PSRS/PEERS Scrum team. She has managed a wide range of Information Technology projects at PSRS/PEERS including disaster recovery improvement projects, SharePoint online implementation, and API integration projects with in-house pension administration software, OASIS.

Ciara has a Bachelor of Science degree in Management Information Systems from Columbia College in Columbia, Missouri. Ciara holds a Project Management Professional (PMP) certification from the Project Management Institute (PMI).

Positive Results from our Next Generation Pension Solution
Tuesday May 14 – 2:15 pm – 3:15 pm
Wednesday May 15 – 9:15 am – 10:30 am
Room: 101-102

Session Description

Last year at PRISM we presented the detailed process of implementing the Four Pillars of our Public Sector Pension System. This year we would like to concentrate on the methodology and results of processes utilized in this implementation and try to relate our success to measurable outcomes.

We will present and discuss each item and give examples of:
1. Summary of the problem.
2. Actions taken to resolve the problem.
3. Describe the participants, software, procedures, testing, and timeframe during the development/implementation
4. Benefits of the solution
5. Synergy with other features/functions
6. Anticipated future improvements

Speaker Biographies

Rudy Koffler, CDP

Chief Information Officer & Sr. Project Manager

Baltimore City Fire and Police Employees Retirement System (F&P)

Rudy has served F&P as CIO/Sr. Project Manager since 2006, re-engineering and modernizing the complete infrastructure, operations and replacing all applications with state of the art technology and processes.

Prior to F&P, Rudy was a Sr. Project Manager for the Baltimore City Board of Education Oracle HRMS Implementation and also for the City of Baltimore IT as the Team Leader for the Payroll/HRMS, Imaging/Records Management, Benefits, Budgets, Pension and other large municipal applications. Rudy was involved in Operations, Infrastructure Communications, COOP and Data Conversions/Interfaces/Cleansing.

Madhavi Ramagiri, MBA

IT Director

Baltimore City Fire and Police Employees Retirement System (F&P)

Madhavi has materially participated in the complete modernization of F&P since 2010 and has been the IT Manager and Sr Project Manager. Madhavi is an accomplished Analyst and PM as well as a DBA, systems architect and integrator. She has also worked for Lockheed Martin in similar functions.

Cindy Davis

Sr Project Manager

Baltimore City Fire and Police Employees Retirement System (F&P)

Cindy Davis, a Project Manager with a demonstrated history of working in the DIGITAL Information Technology arena. Her highly professional skills include providing functional, logistical, technical, and procedural consulting to administration, technical and functional staff. Cindy has recently completed the complex process of managing the successful Imaging project for F&P. The Imaging Projects goal was to Digitize F&P member records in all historic formats that included Backfile Paper, Microfilm and Microfiche for all current and retired members/beneficiaries from the early 1900's.

During this time Cindy has also converted other legacy applications related to Accounting, Legal, HR and Administrative documents from multiple analog platforms to the latest digital format. Cindy's successful implementation of the F&P Digital Conversions Project demonstrates her ability to deliver large complex projects on time and under budget. Cindy is a Long Island University alumni with a Bachelor's Degree in Liberal Arts focused in Business Administration and Management Information Systems.

PRISM Business Meeting Agenda
J W Marriott – Indianapolis, Indiana
Tuesday May 14, 2019 3:30 p.m. – 4:30 p.m.
Room – White River E

1. President's Welcome (Ira)
2. Treasurer's Report (Joe)
   a. Financial Reports
   b. Fees and Sponsor levels
3. Conference Reminders (Ira)
   a. Conference Evaluation Forms
      - Provide comments & feedback on both conference book and mobile app
      - Complete and turn in before leaving the conference
   b. Membership Dues
   c. Conference Registration and Hotel Reservations
4. Member Involvement in Conference (Ira)
5. By-Law Changes discussed and voted on (Ira)
6. Elections (Ira)
   a. Announcement of open positions
      - President-Elect
      - Treasurer
      - Central District Director
      - West District Director

   b. Additional nomination requests
   c. Distribution of ballots
   d. Announcement of election results
7. Present Board Resolution to Outgoing Officers (Ira)
8. New President's Welcome (Ira)
9. Appointment of Webmaster (Dan)
10. Website (Scott)
    a. Website Improvements/Information Updates
    b. Keynote and speaker presentations will be posted on the website shortly after the conference
    c. Enhancement suggestions welcome throughout the conference
    d. Conference mobile app developed separately – future integrations being considered
11. General Conference Format (Dan)
    a. Keynote speakers, Roundtable, Sponsor Consultations, Member Breakouts and "Birds of a Feather" sessions
12. Announcement of 2020 Conference (Dan)
13. Other business? (Dan)
14. Sponsor Passport Drawing (Ira and Dan)
15. Motion to Adjourn (Dan)

Viewing Retirement Through a Digital PRISM

Wednesday May 15th, 2019
9:15 am – 10:30 am & 10:45 am – 12:00 pm
White River A/B

Session Description

LASERS (Louisiana State Employees' Retirement System) has been following a roadmap to revamp our business processes and applications for the past decade, optimizing the workload of staff and allowing greater control of retirement information to retirees. In this session, the process of digital transformation will be unveiled, similar to how a prism uncovers the colors of light. This session will take you through major software upgrades, innovative self-service deployments, and learnings in our early Cloud implementation. While the project was requested by the business and led by IT, ultimately our organization came to realize that a digital transformation is not just a technical challenge but is also a culture change. Join me as we take a look at the technical hurdles we resolved during the journey and the future successes that LASERS will achieve.

Speaker Biography

Eric Schoonmaker
Deputy Information Technology Director
Louisiana State Employees' Retirement System (LASERS)

Eric serves as Deputy IT Director for LASERS. In this role he oversees all aspects of information technology, working in close partnership with agency business units to improve computing services through innovative new projects. Prior to his role as Deputy IT Director, he led the agency's Applications Division where he was responsible for all product development and application support. As a PMI-certified project leader, he has successfully completed key projects for LASERS for pension administration, enterprise resource planning, content management, and investment management. He has recently initiated a project involving the integration of cloud services.

Prior to joining LASERS in 2004, Eric was Applications Director for Sparkhound, a multi-state consulting firm headquartered in Baton Rouge, LA. With almost 30 years of IT experience in both the public and private sectors, he is well-versed in public retirement systems, as well as the healthcare and energy fields. Eric holds a bachelor's of science degree in Computer Science from LSU.

Pension Operations Transformation – Strategy and Decisions in Maryland
Wednesday, May 15th 2019
9:15 am – 10:30 am & 10:45 am – 12:00 pm
Room: White River C-D

Session Description

The Maryland State Retirement Agency (MSRA) began a four-year initiative to re-engineer its pension administration business processes, technologies, and organization –to optimize service to plan participants. This is the last of 3 phases to improve Agency operations – first to establish an agile pension administration IT platform, then to remove anomalies and errors in 40 years of automated data, and finally to re-engineer the business beginning in January 2018. Preliminary strategy was devised in early 2018, guided by an Agency IT Steering Committee. Since then, teams systematically assessed the current state and started the transition. Along the way, there have been numerous surprises, paving the way for an even better end result than originally anticipated. This session will present how this initiative was planned and how it is being executed, commenting on refinements made to date.

Speaker Biographies

Ira R. Greenstein
Chief Information Systems Officer, MSRA

Ira Greenstein has served MSRA since 2007. Previously, his background includes IT consulting at Ernst & Young (now EY), helping to form its original technology consulting and project management practices in the 1980s, followed by executive roles at Coca-Cola Enterprises, Vanstar Corporation, Mentor Technologies, and the U.S. Senate Federal Credit Union. During his career, Ira grew three successful nationwide IT consulting practices and developed methodologies teamed with Microsoft and Cisco Systems. He has a wide variety of leadership experiences in both the public and private sectors. Ira is currently PRISM President, and he earned his three post-secondary degrees from the University of Maryland.

Robert Diehl
Deputy Chief Information Systems Officer, MSRA

Robert Diehl has served MSRA since 2017. Bob began his career at Towson University, where he held increasingly-responsible positions, ultimately serving as Director of Information Systems. He became Manager of Information Systems at the Baltimore County Public Schools, and then IT Operations Director for the Maryland Department of the Environment, before MSRA snatched him away. These experiences in applications, cyber security, infrastructure, user support, and endpoint management provide him a holistic view of IT management. Bob currently maintains a PMP certification, and he earned a B.S. in Mathematics from Towson University followed by an M.S. in MIS from the University of Baltimore.

Panel Discussion: Mobile App Development
Wednesday, May 15th 2019
10:45 am - 12:00 pm
Room 101/102

Session Description

NDPERS deployed the mobile app in the summer of 2016. We had a pilot phase with limited users and later that year announced the availability of the mobile app to all our membership. Our mobile app is based on the Sagitec Mobias platform. One of the reasons NDPERS chose to develop the mobile app is because our current Member Self Service portal is not mobile friendly.

In addition to the North Dakota Mobile App, representatives from Ontario Teachers' Pension Plan and from the San Mateo County Employees Retirement System will be on the panel to discuss their experiences creating and managing Mobile Apps.

Panelists

Sharmain Dschaak   North Dakota Public Employees Retirement System

Ron Gilliam   ND Public Employees Retirement System

Alida Ladak   Ontario Teachers' Pension Plan

Darius Nagal   San Mateo County Employees Retirement System

Birds of a Feather Small Breakouts

Wednesday, May 15th 2019
1:00 pm - 1:55 pm

Session Description

Join a Group of PRISM peers to discuss specific topics of interest to PRISM Members. The Birds of a Feather Sessions are not speaker driven, but roundtable discussions led by a PRISM Board Member to facilitate discussion.

Room 101: Data Security/Physical Security
Room 102: Cloud Lessons Learned
White River C: Disaster Recovery/Business Continuity
White River D: Methodology (Agile/Kanban/Scrum/Waterfall)

Wednesday, May 15th 2019
2:05 pm - 3:00 pm

Session Description

Join a Group of PRISM peers to discuss specific topics of interest to PRISM Members. The Birds of a Feather Sessions are not speaker driven, but roundtable discussions led by a PRISM Board Member to facilitate discussion.

Room 101: Fraud & Breach Discussion
Room 102: Business Intelligence
White River C: Telecommuting/Work From Home/Incentives for Retention
White River D: VOIP, SIP, CRM, etc.

Section 3:

Sponsor Attendees, Sponsor Descriptions

AVENU
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- Agile Project Guidance
- Agile setups

Getting Your Work Done

- Project Management & Oversight
- Requirements Definition & Procurement
- Testing Support & Oversight
- Data Conversion Oversight
- Quality Assurance
- Post Go-live Stabilization & Support
- Cross-System Integration

Defining the Future

- Organizational and Workforce Assessments
- Strategic Planning
- IT Assessments & Roadmaps
- Business Strategy
- Feasibility Assessments
- Gap Analysis
- Post-Implementation Strategy

Empowering Your Organization

- Change Management
- Operational Procedures/Processes
- PMO Setup
- Business Process Improvement and Workflow Automation
- Training and Coaching of project teams and staff

BARBARA SCHEFFELS - MSCS, CSM, CSP, CAPPP
bscheffels@agileprogress.com
310.770.7361

PAUL CHAPPLE - CSM, CSP, PMP
pchapple@agileprogress.com
972.951.7102

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Displays quick responses to commonly asked questions

Secure Retirement Benefits Estimator

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Tech City EMPLOYEES RETIREMENT SYSTEM

TO GET STARTED, CLICK ON ONE OF THE OPTION CHOICES BELOW.

→ What will my monthly benefit be on retirement date _____ ?

→ What will my monthly benefit be if I retire at age _____ ?

→ What will my monthly benefit be if I retire after _____ years of service?

→ When will I be able to retire if I need $ _____ monthly benefit amount?

→ What will my monthly benefit if my salary increases to $ _____ ?

What date do you plan to retire? 01/01/2 *Please enter a date at least 6 months into the future.*

What would be your ideal average final compensation? $83,88

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- Creates PDF printout for member to keep
- Easy to Use

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02/28/2018 Date Today | Mid DROP2 DROP Status

Tech City EMPLOYEES RETIREMENT SYSTEM

HOW-TO-VIDEO PRINT F.A.Q. RESET LOG OFF

Secure Retirement Benefits Estimator

Estimated **$42,260.11** Annual Retirement Benefit

Estimated **$3,521.68** Monthly Retirement Benefit

VARIABLES THAT AFFECT YOUR RETIREMENT BENEFITS (CLICK ARROWS TO RE-CALCULATE YOUR ESTIMATED BENEFIT)

$16.02 Estimated Monthly Benefit Value for One More Month of Service

< 01/01/2019 > Desired/Projected Retirement Date (MM/DD/YYYY) (Must be 1st Day of Month)

< 49 > Desired/Projected Member Age at Retirement

< 21.29722 > Desired/Projected Years of Creditable Service (Decimal Equivalent)

< $83,881.00 > Projected Average Final Compensation (AFC) at Retirement

1 Months Until DROP2 Completion

ESTIMATED DROP2 BENEFITS

01/31/2019 DROP2 End Date

$178,824.95 DROP2 Balance at Retirement

$11,546.03 Estimated Annual DROP2 Annuity

$53,806.14 Estimated Combined Annuitized Annual Benefit

$4,483.85 Estimated Combined Annuitized Monthly Benefit

MEMBER ACCOUNT INFORMATION FROM JUNE 30 ANNUAL STATEMENT

A99	Yes	10/14/2004	02/22/1969
Department	Grandfathered Status	Membership Date	Date of Birth

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Maryland

DRS WASHINGTON STATE
Department of Retirement Systems

www.bizagi.com

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Ross Gilmore
CO-LEAD GOVERNMENT SOLUTIONS
rgilmore@captechconsulting.com

Adam Hofheimer
PRINCIPAL, CO-LEAD GOVERNMENT SOLUTIONS
ahofheimer@captechconsulting.com

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CBIZ Retirement Plan Services specializes in defined benefit pension administration, personalized employee communications and benefits technology.

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- ► Full outsourcing
- ► Co-sourcing
- ► IPASMaster™
- ► Participant pension website
- ► Retirement modeling
- ► Data clean-up
- ► Plan terminations
- ► Lump sum cashout windows
- ► Pension calculation projects

Communications

- ► Total compensation & benefit statements
- ► Executive compensation and equity statements
- ► Management reporting
- ► HR strategy communications (annual enrollment)

Custom Websites

- ► Compensation & benefits survey
- ► New Hire Advantage
- ► Health assessment tracking
- ► Employee surveys

Human Capital

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Modernizing mission-critical systems is a risky business. As a leading IT services partner for governments and commercial organizations, CGI is entrusted to build and manage complex business and IT solutions for our clients' most

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10	Fortune's Most Admired Companies 10 Years in a Row	**16**	Barron's 100 Most Sustainable Companies 2018
18	Forbes FastTech 25	**14.8**	Billion USD in Revenue 2017
205	Fortune 500 Ranking	**17**	Fortune Future 50 Ranking

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Retirement Public Sector Services:

Challenges & Opportunities	Cognizant Solution Capability
Member Experience • Paper forms and mail • In-Person • Call center	• Integrated end-to-end services; digital enablement; mobile platform creation for 24/7 self-service access for members. • Application of human-centric design thinking, data science and pension industry knowledge to reimagine products and user experiences at speed & scale. • Digital pension business models and systems that meet member, employer, and agency needs.
Operational Efficiency • Multiple manual touches • Paper forms • Multiple phone calls • Mail delays	• Robotic Process Automation (RPA) to increase efficiencies, allowing staff to focus on critical member and agency needs. • Enterprise Content Management (ECM), addressing image capture, storage, search, and organization of member & agency communications. • Use of artificial intelligence, machine learning and natural language processing, Voice-Bots and Text-Bots to increase straight thru processing and reduce manual touchpoints for front-office and back-office.
Technology Modernization • Legacy Applications hosted on-premise • Customization requiring long time-to-market and high effort • High Total Cost of Ownership	• Agilization is in our DNA enabling our clients to run at digital speed and leap ahead in today's fast-paced business world. • Reducing the Total Cost of Ownership for your Agency supporting your move to the Cloud; whether AWS, Azure, Google Cloud, Bluemix, etc; our implementation strength supplemented by Cognizant's Cloud360 & Cloud Speed. • We secure your Agency on your modernization journey, through a suite of security solutions designed to safeguard member's data, applications, and infrastructure. Our focus on cyber security and threats, is about your Agencies data privacy & protection across your entire ecosystem.
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WAYNE MORRIS | Associate Director
Retirement Public Sector Practice
(215) 995-1002
Wayne.Morris@cognizant.com

VENKATA REDDY KETHU | Associate Director
Retirement Public Sector Practice
(551) 227-5731
VenkataReddy.Kethu@cognizant.com

DAVID JOHNSON | Sr. Vice President
Global Head Public Sector Practice
(602) 790-3483
David.Johnson@cognizant.com

DAS Company Description

DAS, an IBM/FileNet Premier Business Partner, has been dedicated exclusively to the Enterprise Content Management marketplace for over 25 years. DAS' primary core competencies include designing IBM FileNet systems, workflows and case management, electronic forms, records management and capture (DataCap). DAS also offers direct maintenance and support including system evolution planning and managed services. Additionally, DAS has expanded its portfolio to include a data strategy practice, including an experienced full-stack data scientist on staff. Application areas include data mining, data optimization, and other predictive/prescriptive analytics modeling. Talk to us about how to extract value from the dark data in your ECM repository.

Having performed hundreds of implementations since 1994, DAS is committed to helping solve its clients' business problems through technology solutions. DAS has experience across a wide array of industries, including working with multiple retirement systems, and has clients all across North America.

Matt Weis

Matt is one of the founders/principles of DAS, with responsibility for the sales and professional services business units including strategic initiatives. His experience and knowledge in the Enterprise Content Management industry provides a unique offering to DAS customers, software vendors and partners.

Camden Weis

Cam is the Senior Account Executive for DAS with responsibility for the sales, marketing and business development functions of the company.

Matt Weis
Vice President
DAS an IBM Premier Business Partner
Main   336-870-0013
FAX   336-217-8878
mweis@DASpartner.com

Camden Weis
Senior Account Executive
DAS an IBM Premier Business Partner
Office   804-644-7600 ext. 405
CELL   336-491-9517
cweis@DASpartner.com

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Tom Zacharias
Practice Leader
(678) 849-6230
tzacharias@deloitte.com

Dave Sweeny
Senior Manager
(919) 521-6236
dsweeny@deloitte.com

Jamie Helms
Senior Manager
(612) 397-4546
jhelms@deloitte.com

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Ishu Chhabra
Managing Director

With over 20 years of impactful management along with systems and product experience in Retirement Services, Mr. Chhabra's expertise lies in business transformation, strategic planning, quality and process improvements, problem solving and negotiations. He has developed, implemented and managed an offshore operations department and redesigned multiple operating units to a functional processing structure. He is a highly qualified technology, operations and call center manager of multi-site departments handling Defined Contribution plans.

e: ichhabra@enterpriseiron.com
p: 703.599.5882

Tim Scott
Delivery Partner

Tim Scott has over 30 years of experience in the retirement plan services industry primarily serving banking, insurance, trust, technology and other asset management clients. Mr. Scott has extensive technology, operational, business development and client services background and has led multiple IT transformation efforts. He has also led the largest Professional Services unit of a major international IT Services organization.

e: tscott@enterpriseiron.com
p: 205.234.3983

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- **Conditioning**
- **Integration**
- **Migration**
- **Administration**

Michael Thibault
President / CEO
mthibault@iconintegration.com
913-221-8801 (office)
913-708-1687 (cell)

Rob Rust
VP Business
Development
rrust@iconintegration.com
913-221-8801 (office)
573-808-6494 (cell)

Leon J. Schwartz
VP Client Relations &
Communications
lschwartz@iconintegration.com
913-221-8801 (office)
641-745-9041 (cell)

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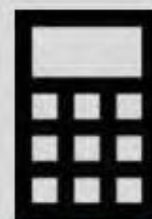## Powering Your Pension Administration

PENWEB
Member and Employer Self-Service

CSAR
Calculation Services and Rules

PENFAX 5
Pension Administration System

DCT
Reporting Employee HR and Payroll Data

S³
Self-Service Retirement Savings Platform

HOSTING
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Anticipate today. Deliver tomorrow.

As one of the largest providers of professional services to the government sector, our data and analytics services and solutions help governments, at all levels, deliver improved services and outcomes. Our Data & Analytics practice achieves these objectives by combining our data quality-driven processes, technologies, and advanced analytics capabilities with our deep-rooted domain expertise.

Data & Analytics capabilities

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Big data architecture	Data mining	Data security	Machine learning

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Contacts:

Rob Wentz | Managing Director, Advisory | rwentz@kpmg.com | 610-416-5992

Sid Frank | Director, Advisory | sidfrank@kpmg.com | 770-833-0983

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Jennie Wilson
Manager
Channel Programs and Sales
Jennie.Wilson@lexisnexis.com
813-508-2521

Ken (Robert) Kennedy
LexisNexis Certified Consultant
Robert.Kennedy@lexisnexis.com
336-841-2187

HOW TO PREVENT ACCOUNT TAKEOVER IN PUBLIC RETIREMENT SYSTEMS

Increase your retirement systems' security and reduce potential vulnerabilities

To help protect funds from account takeover, public retirement systems must continuously improve information security measures and upgrade their identity management systems against current threats. Identity verification and authentication processes require a balance of increasing security while balancing usability.

Here are four well-established and important data-driven methods for strengthening defenses against identity-based threats:

Evaluate Identities (physical and digital). Defend against threats using a multi-faceted identity assessment process. Agencies should be scrutinizing an identity through many layers.

Access fresher data. Identities are constantly evolving. For clearer visibility into identities, agencies need external identity data that is comprehensively sourced and continually updated.
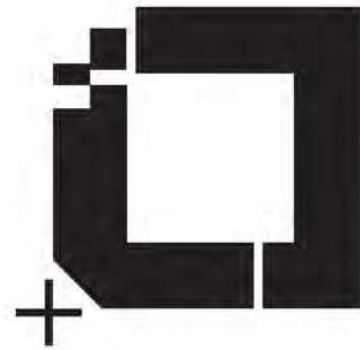
Leverage investigative insights. Hard-earned investigative intelligence should inform and enhance real-time threat prevention.

Strengthen security and improve operational efficiencies. Leverage identity verification tools to enable a fast and seamless password reset process for beneficiaries.

Visit the LexisNexis Risk Solutions booth in the sponsor room adjacent to the main hall for more information and to speak with our subject matter experts.

http://solutions.lexisnexis.com/retirementsystems

LINEASECURE

As high profile cyberattacks continue to make headlines, the need to protect your assets has never been more urgent. Linea Secure offers **strategic cybersecurity solutions** to better prepare organizations for the evolving threat landscape.

As a fiduciary:

+ What are your areas of heightened vulnerability?
+ What is your plan?
+ Which framework do you follow?
+ What are your key controls?
+ Do you perform an annual assessment?
+ What do you need to work on?

ASSETS

RISK

MEMBER RECORDS

REPUTATION

Peter Dewar
pdewar@lineasecure.com

Cassie Kirchmeier
ckirchmeier@lineasecure.com

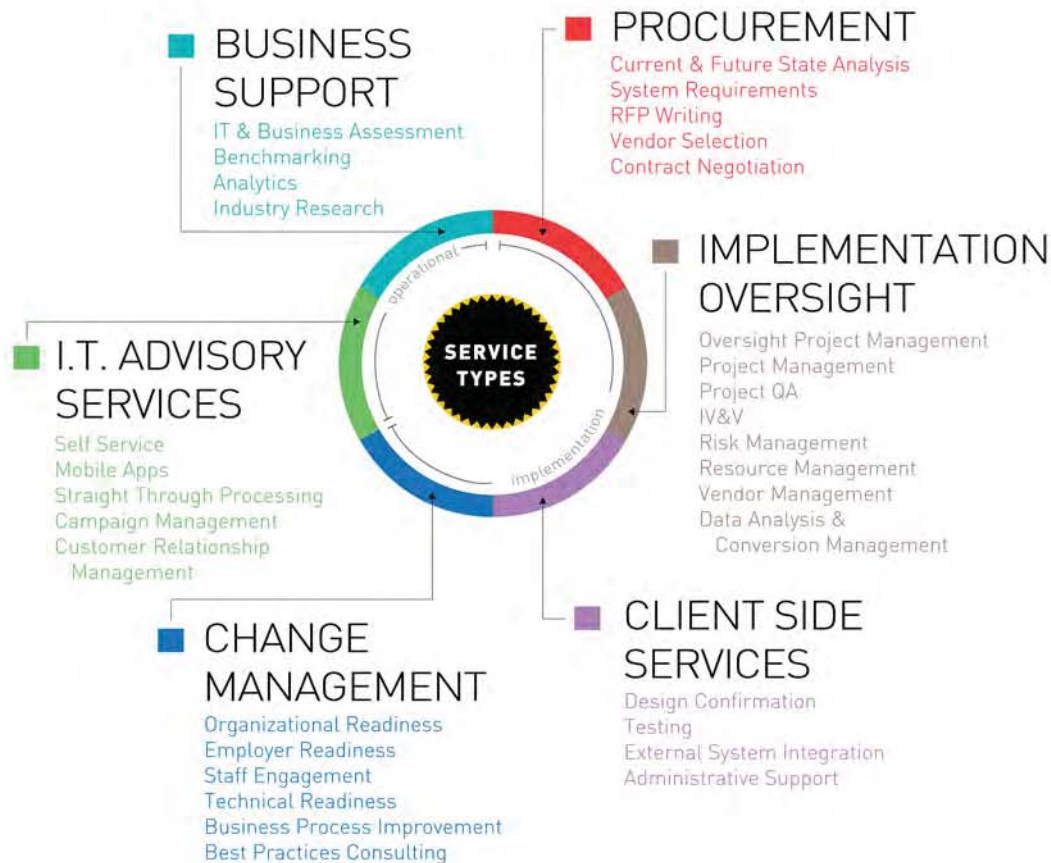## Stephen Kell
skell@lineasecure.com

info@lineasecure.com / lineasecure.com / 855.546.3248

We love your problems.

We love solving them, too. Linea Solutions provides **information technology and management consulting services** for pension & benefit funds and insurance organizations across the U.S. and Canada. We help clients adapt to change brought on by growth, increased customer expectations, outdated technology, and the evolving business and legislative environment.

BUSINESS SUPPORT
IT & Business Assessment
Benchmarking
Analytics
Industry Research

PROCUREMENT
Current & Future State Analysis
System Requirements
RFP Writing
Vendor Selection
Contract Negotiation

IMPLEMENTATION OVERSIGHT
Oversight Project Management
Project Management
Project QA
IV&V
Risk Management
Resource Management
Vendor Management
Data Analysis &
   Conversion Management

I.T. ADVISORY SERVICES
Self Service
Mobile Apps
Straight Through Processing
Campaign Management
Customer Relationship
 Management

CHANGE MANAGEMENT
Organizational Readiness
Employer Readiness
Staff Engagement
Technical Readiness
Business Process Improvement
Best Practices Consulting

CLIENT SIDE SERVICES
Design Confirmation
Testing
External System Integration
Administrative Support

SERVICE TYPES

Akio Tagawa, Principal
atagawa@lineasolutions.com

Bryce Haws, VP of Strategic Relations
bhaws@lineasolutions.com

Lon Tiggelaar, Principal Consultant
ltiggelaar@lineasolutions.com

LINEASOLUTIONS

2701 Ocean Park Blvd Ste 251, Santa Monica, CA 90405 - 310.331.8133
lineasolutions.com

LR▼L INC.
Moving Retirement Systems Forward

We are a nationwide consulting firm offering services specifically focused on addressing the operational and technological challenges of pension and benefits administrators.

LRWL provides a partnership approach with all the **services** we provide to retirement benefits administration organizations. The first step in any engagement is for our consultants to *listen* to the organization's experts and stakeholders to understand the operations, past projects, lessons learned, and the vision driving them forward. Once aligned, LRWL's consultants will meld our understanding of your organization with innovative ideas and best practices collected and refined over the course of twenty-five years and 80 pension clients to determine the best approach toward a successful relationship and project.

Organizational Services
- ✓ Business process improvement and reengineering
- ✓ Strategic planning
- ✓ Organizational change management
- ✓ Project feasibility studies and readiness assessments

System Implementation Related Services
- ✓ Oversight Project Management
- ✓ Quality Assurance
- ✓ Independent Verification & Validation
- ✓ Project Management
- ✓ Test Management
- ✓ Employer Reporting Rollout Planning

Technology Selection and Procurement Services
- ✓ Developing needs analysis
- ✓ Project planning
- ✓ Business case development
- ✓ Requirements definition
- ✓ Developing Request(s) for Proposals
- ✓ Procurement assistance and methodology development

General Consulting & Support Services
- ✓ Solution design and business analysis support
- ✓ Business Rule collection and reporting
- ✓ CIS (Security) 20 Assessments
- ✓ Correspondence, Forms, and Report updates and design
- ✓ Business Process Documentation

PRISM Attendees:

Jeff Mills
millsj@lrwl.com
301-908-3014

Ed Meyers
meyerse@lrwl.com
703-872-9573

Maureen Gatewood
gatewoodm@lrwl.com
614-619-5954

For more information, visit us at www.lrwl.com

Transform your state's public retirement system **with a partner you can trust**

The MAXIMUS Difference

Project partnership	**Apply best practices**	**Accelerate benefits**
Increase quality	**Reduce risk**	**Early warning** / CHECK ENGINE
Decades of experience 2+		

- 20+ years performing QA and IV&V on large, complex systems in nearly every state

- Experience supporting multiple pension system IT replacement and modernization projects, including CalSTRS

- Independent oversight and objective guidance that drive results

Trust MAXIMUS to provide the knowledge, methodologies and technologies essential to implementing your project with confidence.

MAXIMUS®

MBS
A Sealaska Company

MBS has proven success solving these kinds of data challenges for Pension System clients

Person Record Matching

MBS uses data matching algorithms to find common person records among multiple sources even for non-perfect matches.

Address Scrubbing

MBS applies standardized approaches to fill in missing address data and to cleanse conflicting addresses.

Account Balance Auditing

MBS builds detailed transaction comparisons to find discrepancies leading to account balances that can be trusted.

Pension Data Integrity

MBS builds a foundation of pension data by linking together pension history, payment records and calculation events.

MBS can leverage these techniques and its industry expertise to migrate your data to new systems

Managed Business Solutions (MBS) focuses on delivering high-quality Information Technology Consulting Services

- 24-year track record of delivering rapid results and continued client satisfaction
- Alaska Native Corporation; representing 20,000 tribal shareholders
- Founded in 1993 and headquartered in Colorado Springs, Colorado

Please contact us for a free consultation

to learn more about our effective processes and techniques for making your Pension System data work for you.

Al Gates, Principal Consultant

970.222.9629

al.gates@mbshome.com

M|ND
OVER MACHINES

For More Information Contact:
Mike Rolfes, Director of Strategic Partnerships
443.985.0449
mrolfes@mindovermachines.com

WITH AN EMPHASIS ON HUMAN-CENTERED DESIGN, WE COLLABORATE WITH CLIENTS FROM STRATEGY TO EXECUTION.

We specialize in tailoring enterprise software, modernizing legacy applications, and leveraging emerging technologies to deliver smart solutions to our clients.

ENABLING PEOPLE TO WORK SMARTER

We are motivated by a desire to learn, innovate, and deliver solutions that will help our clients capture new revenue, grow their competitive advantage, and cause a greater impact in the community that they serve.

We excel in the following areas of service:

Business Strategy	**CRM/ERP Implementation**
Data Integration	**Process Improvement**
Legacy System Support	**Custom Application Development**

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MORNEAU SHEPELL

Retirement and benefits technology solutions for public sector organizations

For over 50 years, Morneau Shepell has developed innovative technologies and delivered solutions to address the issues and concerns which challenge public retirement systems. Enabling them to adapt, persevere and thrive in a complex administrative environment. Our technology increases the value of member benefits and reduces the cost of plan administration.

Ariel

Our Ariel Enterprise Administration Solution (Ariel EAS) is a configurable platform designed to implement and execute the specific provisions and processes of public retirement system benefit programs. Ariel EAS is rules-based, extensible, and event-driven, with integrated workflows that reduce or automate routine administrative processing.

Ava™

Morneau Shepell has developed Ava™, an intelligent, automated assistant, to further our effort to simplify benefits administration. Ava™ is evolving to meet the future needs of staff, employers and members. For example: Employers can quickly receive summaries of data collections/remittances, member information, or member events. Members can obtain tax slips, annual statements, projections for estimated value, update personal information, and initiate retirement.

For more information, please visit morneaushepell.com or contact us:

Jim Kelly, Vice-President
National public sector practice leader
jkelly@morneaushepell.com

ORION
DEVELOPMENT GROUP

The Business Process Management Experts
Helping You Get IT Right the First Time

Line of business upgrades are inextricably tied to your business processes. Too many IT vendors "check the process box." Let Orion help you design and implement solutions that last.

Orion's Services
Training, Coaching, Consulting

- Transforming the Member Experience
- Process Mapping and Streamlining
- Business Process Management
- Process Improvement and Reengineering
- Design and Implementation of the Process-Oriented Organization
- Lean Pension
- Project Management
- Strategic Planning
- Knowledge Retention Solutions
- Process and Risk Management Software

Why Orion? Sustainable Results!

Our clients don't just meet project goals, they *transform* customer service, operational capacity and establish new management practices that drive organizational success for years –even decades– to come. Indeed, the managers Orion has worked with have gone on to become key members of the leadership teams in their public pension organizations.

What does Orion do differently?

Our firm was created by practitioner *educators*. Central to Orion's approach is teaching and empowering your employees to create the solutions to your business problems. When we leave, our solutions and capabilities don't walk out the door with us.

Come visit us at Orion's booth. Ask us why the Orion experience is truly different!

Paul King
Founder

Bob Boehringer
BPM Visionary

11404 Beach Channel ◆ Rockaway Park, NY 11694 ◆ (800) 510-2117 ◆ businessprocessmgmt.com

It is time to change how to think about change.

perspecta™

Are you getting the best solution possible for your benefits administration needs?

If you are using a proprietary solution then your answer should be no! Because no point solution can be the very best at it all. What you need is a solution that can leverage your previous IT investments, position you for change, let you pick your components based on your customer and processing needs, and capitalize on market leading products without asking you to throw money away.

Get what your agency needs: solution flexibility

Spend every IT dollar as efficiently as possible. The Clarety™ Solution stands out from others with our hybrid or best of breed approach. We leverage the IT investments you have already made so you can achieve a maximum return. With our solution, you can modernize at your own pace, budget by transforming a piece at a time — for example the workflow or contact management application— and then simply reconnect it to existing modules. This approach positions you to change different pieces without spending millions of dollars dismantling and replacing everything.

The Clarety Solution

Powerful platform
Preconfigured application framework offers ease of deployment and the flexibility to tailor the solution to your business and IT environment.

Best-of-breed components
Utilizing technology that delivers to your specific technical needs provides the most efficient use of current and future IT dollars.

Reuse of previous investments and legacy system
Leveraging your previous investments and reusing your legacy system capitalizes on your internal depth of experience and knowledge of your agency's processing needs.

Gradual evolution of system
Employing a service oriented architecture and loosely integrated components positions your agency for future changes to the system as new technology emerges and older technology goes end of life. You pick what you want to upgrade or replace and when without having to replace any other component of the system.

PRISM attendees:

Jeff Adair	jeff.adair@perspecta.com
Kingsley Swamidoss	kingsley.swamidoss@perspecta.com
Vijay Balasubramanian	vijayharihar.balasubramanian@perspecta.com

At Perspecta (NYSE: PRSP), we question, we seek and we solve. Perspecta brings a diverse set of capabilities to our U.S. government customers in defense, intelligence, civilian, health care and state and local markets. Our 260+ issued, licensed and pending patents are more than just pieces of paper, they tell the story of our innovation. With offerings in mission services, digital transformation and enterprise operations, our team of 14,000 engineers, analysts, investigators and architects work tirelessly to not only execute the mission, but build and support the backbone that enables it. Perspecta was formed to take on big challenges. We are an engine for growth and success and we enable our customers to build a better nation. For more information about Perspecta, visit perspecta.com.

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Presidio enables our clients to capture the economic value of digitally transforming their businesses.

Presidio enables our clients to capture the economic value of digitally transforming their businesses. Bringing deep solutions expertise and a full lifecycle of services, we help our clients build the connected, cloud-agile, secure IT infrastructures that will drive them forward.

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to Support Your Entire Lifecycle

CYBERSECURITY LIFECYCLE

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- Program Development
- Education & Training
- Cyber Assessment
- Advisory Services

Protecting your business from cyber-attacks is a full-time task that grows more demanding, specialized, and sophisticated every day.

Partner with Sage, a division of Tyler Technologies, to ensure your organization is fully trained, compliant, and prepared for evolving cybersecurity threats.

www.sagedatasecurity.com

Meet with our Cybersecurity Experts at the 2019 PRISM Conference.

Brendan D. Travis, CISM
Director of Business Development
brendan.travis@tylertech.com
800.772.2260 ext. 2345

Rick Simonds
Vice President, General Manager
rick.simonds@tylertech.com
800.772.2260 ext. 2339

Sage Data Security is Now Part of the Tyler Technologies Family!

tyler technologies

sagitec

DRIVING VISION INTO ACTION

Sagitec is a global software provider focused on solving complex problems for the benefits administration industry with domain experts and proven technology.

www.sagitec.com

Technologies of Focus

Neospin™
An adaptable, flexible, and fully integrated pension administration solution.

Microsoft Azure Hosting
The Microsoft Azure platform enables us to deliver software in the cloud, securely and expeditiously.

Sagitec Software Studio (S3)
A true developer's platform to increase quality and reduce time to production for benefit administration solutions.

NeoRecovery
One-click, automated disaster recovery in the cloud

THE WORLD OF WORK IS CHANGING.

But your goal of providing high-quality service to your members is not.

From the experience your members have when they contact you to how conveniently they can access their information, your benefits administration and technology should reflect a seamless experience focused on them. Why? Because you can't afford to have inefficient processes or outdated systems that are unprotected, when your members rely on them for their retirement benefits.

So if you are experiencing processing backlogs, member service issues, reporting difficulties or struggling with outdated technology that is not meeting your needs, Segal can help.

Talk with us.

Amy Timmons
Vice President
atimmons@segalco.com

Michael Stoyanovich
Vice President
mstoyanovich@segalco.com

✦ Segal Consulting

Public Retirement Information Systems

Softech & Associates, Inc. is a premier provider of IBM Digital Business Automation software and solutions.

Softech has extensive experience working with content and data-intensive organizations that manage **Public Retirement Information Systems** including government, insurance, healthcare and financial entities.

Softech provides a comprehensive set of tools to enhance client investments in content management technologies and gives clients the ability to deploy retirement and pension automation: internally and externally.

Softech offers easy-to-use solutions that are proven, both technologically and through user acceptance, and with our media migration, conversion and upgrade services, we help our clients enhance their efficiency over time.

Stop by our table and learn about the wide variety of services Softech offers.

Softech & Associates

1570 Corporate Drive, Ste B.
Costa Mesa, CA 92626

714-427-1122

info@softechis.com

William Shute
858-583-9266

Corey Meitchik
908-612-2192

TEGRIT
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Pension & Technology Solutions

Tegrit's industry leading experts leverage the latest technology to improve your business efficiencies and reduce administrative costs.

Arrivos Software & Tegrit Services

Pension Administration
Maintain member data
Maintain employer information
Process retiree payroll
Calculate accurate benefit estimates

Document Management & Imaging
Improve business process efficiency
Improve customer service
Minimize risk
Eliminate paper files

Member/Employer Portals
View pension information at a glance
View/update personal information
Run accurate benefit calculations
Enroll & update active member data
Report wages, service & contributions

Data Services
Ensure compatibility
Guarantees clean data
Ensure usability
Verify death and address data

Consulting Services
Maximize efficiency
Business process reengineering
Create technical roadmaps
Identify needs & opportunities

Reporting & Analytics
Executive dashboard and metrics
Configurable canned reports
Data visualization
Custom report writing

Timothy G. McClure
Chief Executive Officer
tim.mcclure@tegrit.com
586.306.2883

Bala Rajamani
Managing Director, Pension & Technology Solutions
bala.rajamani@tegrit.com
614.204.8771

Michelle Palatas
Chief Strategy Officer
michelle.palatas@tegrit.com
734.402.8932

www.tegrit.com

V3

Software for Retirement Administration

Redefining Retirement Administration

V3 Supports Defined Benefit, Defined Contribution and Tax Deferred Annuity Processing.

Supports Your Plans

V3 is a fully integrated, highly scalable solution suitable for use by public pension funds, Taft-Hartley plans, municipal plans, third party administrators and other similar organizations.

Daily Tasks Made Easy

Address a full spectrum of requirements including enrollment, payroll reporting, contributions processing, benefits calculations and benefits payroll.

Transform Your Operations

Enable dramatic business process improvement within your organization. V3 Workflow, call center, Self-Service and Imaging features will streamline pension benefit processing.

V3 offers a complete suite of administration capabilities and a comprehensive set of enterprise features in a single, integrated solution, specifically designed for the challenges of public pension administration.

V3 is redefining benefit administration by delivering solutions that drive innovative best practices, empower your customers, and provide reliability and security. It is a technically advanced, configurable, and scalable system - delivering solutions that grow along with your evolving business needs.

V3locity

V3locity™ is a turn-key, AWS-based alternative to an on-premise installation. It is V3 encapsulated inside of a powerful, proprietary management layer that ensures smooth, effective operations 24x7x365. It is a fully managed platform that delivers tremendous scalability, security, and reliability with minimal upfront expenses and a predictable, contained long term cost model.