OREGON
PERS
PUBLIC EMPLOYEES RETIREMENT SYSTEM

2025–2030
Information Technology Strategic Plan (ITSP)

Revised October 2025

Contents

Originally Published April 2024, Last Revised October 2025

Letter from the Chief Information Officer

It is my privilege to present the updated 2025–2030 PERS Information Technology Strategic Plan. This blueprint outlines a high-level view of the long-term direction and priorities that the PERS Information Services Division (ISD) is pursuing in order to serve PERS' overarching mission. The strategic goals and objectives described here strive to augment and clarify the agency's vision and guiding principles within the IT setting.

To help ensure PERS' success over the next five years, ISD will concentrate on two principal areas, aligned closely with operational and modernization efforts. These focus areas originate within the PERS Strategic Plan and align with the Governor's Oregon Agency Expectations, the Enterprise Information Services (EIS) Strategic Framework, the Legislature's key process measures (KPM), and Modernization Program goals.

Focus areas:

Maintain jClarety through Modernization — jClarety, PERS' current pension administration system, the backbone of the Oregon Retirement Information Online Network (ORION), is slated to be replaced with a Commercial-off-the-Shelf (COTS) pension administration system solution as part of the PERS Modernization Program. During this transition, jClarety must be maintained and updated as needed in order to enable it to continue to provide all required business functionality as dictated by regular operations, internal or external change requests, legislative mandates, or other future requirements.

IT Workforce Development — our pension administration system is only as good as the people who build and maintain it. ISD will need to attract, enhance, and sustain a strong and talented team that can help propel us into the future.

In the following pages, I invite you to read more about ISD, the current and future IT landscape at PERS, the strategies, goals, and values mentioned above, as well as key initiatives shaping our modernization and operational future.

Thank you for your interest and support,

Jordan Masanga
Chief Information Officer

October 2025

Introduction

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

The IT Strategic Plan (ITSP) 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 Strategic Plan (Updated September 2025), 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.
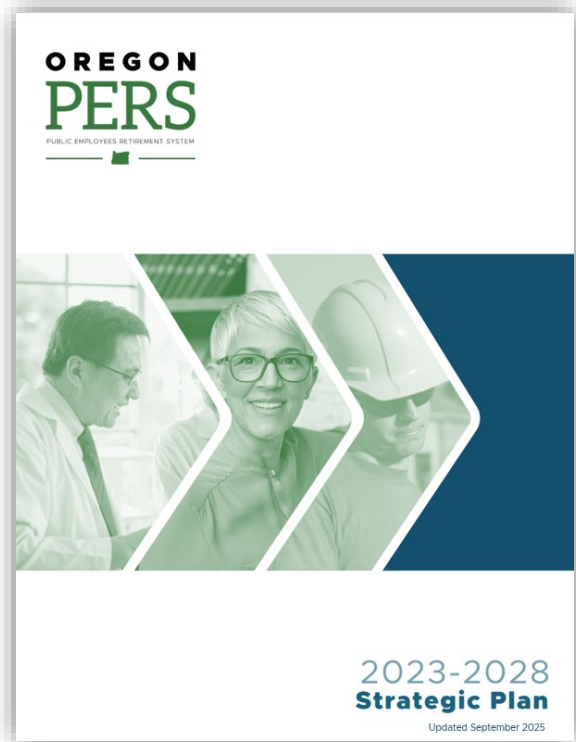
About PERS Information Services Division

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, plus up to a dozen or so contractors depending on phases of projects.

Information Services Division

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

Internal tools

- IT Service Management: Ivanti (aka "Compass").
- Collaboration: JIRA, SharePoint, Microsoft Teams.
- Software Configuration Management: Subversion (SVN), OrbusInfinity.
- 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:

- Security Risk
- Regulatory Urgency
- Agency priority
- Division priority
- Section priority
- Technical debt impact

- Business value
- Ease of implementation
- Effort (initial time estimate)
- Resource availability
- Dependency/sequence risk
- ROI/cost-benefit

Note: For PERS enterprise-wide programs and projects, including Maintenance and Enhancement (M&E), the prioritization and tracking are the responsibility of the Project Management Office (PMO) in the Central Administration Division. Nevertheless, these enterprise-wide programs and projects are also included in the IT roadmap.

For other details about project prioritization and tracking, refer to Appendix A.

Project tracing and governance

To ensure alignment, transparency, and accountability across both modernization and ongoing IT operations, ISD applies a clear governance framework that links IT projects directly to strategic priorities. Traceability flows in two directions:

- **Top-down**: Connects agency and IT strategic plans to projects, answering, "What IT projects are we undertaking to advance the Agency Strategic Plan and execute the IT Strategic Plan?"

- **Bottom-up**: Connects projects to strategy, answering, "Why are we doing this IT project?"

ISD also maps each project to a "driven-by" source and applies a RACI framework to clarify roles and responsibilities across functions, ensuring visibility along with the ability for governance bodies to make well-informed prioritization decisions. Driven-by sources and modernization and operations overseeing bodies include:

Driven-by sources:

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

- PERS Strategic Plan — sets agency priorities and operational needs that guide IT projects.

- PERS Modernization Plan — defines agency-wide modernization efforts.

- IT Strategic Plan — IT initiatives supporting agency needs and priorities, informed by organization and modernization goals, regulatory and stakeholder requirements, as overseen by governance bodies.

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

Governance bodies:

- Executive Leadership Team (ELT) — sets enterprise priorities, oversees agency operations, aligned with core values and principles. *(Meets weekly)*

- Portfolio Management Committee (PMC) — provides direction and structured oversight of agency-level projects. *(Meets monthly)*

- ORION Steering Committee (OSC) — tracks and prioritizes maintenance and enhancement needs for ORION, the agency's primary pension management system. *(Meets every other week)*

- Modernization Executive Steering Committee (MESC) — oversees and prioritizes modernization program activities. *(Meets monthly)*

- **PERS Enterprise Architecture Team (PEAT)** — ensures alignment with short- and long-term state and agency standards and strategy. *(Meets weekly)*

- **PERS Outcome-Based Management System Council (POBMS)** — integrates coordination of functions sustaining POBMS. *(Meets monthly)*

- **Data Governance Committee (DGC)** — oversees agency data to ensure consistent data handling, accessibility, and evidence-based decision-making. *(Meets monthly)*

- **Information Security Board (ISB)** — guides information security activities to safeguard system effectiveness, best-practice alignment, and policy compliance. *(Meets monthly)*

- **Legislative Action Team (LAT)** — evaluates legislation to support informed planning, operations, and fiscal decisions. *(Meets during legislative sessions as needed)*

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 (later 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 — *including the plan to replace the system with a Commercial-off-the-Shelf (COTS) solution as part of the PERS Modernization Program*.

This work and this transformative shift cannot happen overnight (current estimates put the complete adoption of a new PAS system at approximately 8-10 years) and improvements will still be needed to continue to modernize jClarety and supporting systems in order to ensure operational continuity, 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 a current effort to migrate the servers from Co-Location to Managed Host within DCS.

PERS IT future state

Future landscape

As part of the modernization journey the Pension Administration System (PAS), will transition to a Commercial-off-the-Shelf (COTS) application. In addition, ORION's other core applications will be rearchitected as independent, discrete business services providing greater system security, flexibility, and opportunities for growth. The PERS Modernization program is anticipated to take between 8-10 years after selecting a COTS vendor and will need to uphold continuity of service while transitioning core business functions to the new platform. This work will enable more scalable and modern pension administration capabilities while supporting day-to-day operations along the way.

ISD will strengthen resiliency and security by adopting a formal framework that defines recovery objectives, service availability expectations, and incident response processes as directed by the business. These benchmarks will be aligned with State of Oregon standards and industry best practices, mapped to applicable compliance requirements, and regularly validated through testing and audits. As modernization progresses, resiliency and security targets will be refined in partnership with enterprise risk management to ensure they remain current, measurable, and responsive to evolving threats.

ISD will responsibly leverage Artificial Intelligence (AI) to enhance service delivery, improve operational efficiency, and strengthen decision-making. AI capabilities will be introduced in alignment with State of Oregon policies and ethical frameworks, ensuring transparency, security, and accountability. Over time, AI will support tasks such as streamlining member communications, accelerating data analysis, and augmenting staff capacity, while maintaining human oversight for all critical pension decisions.

Finally, our division will continue to transform its working environment - continuing to foster diversity, equity, and inclusion[1] while encouraging collaboration and innovation, attracting new talent, and developing and retaining current staff—ensuring PERS is prepared for both operational excellence and modernization success.

IT key needs

As highlighted above, to realize this future state of IT, ISD will need to have a 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

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[1] See PERS DEI Plan

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
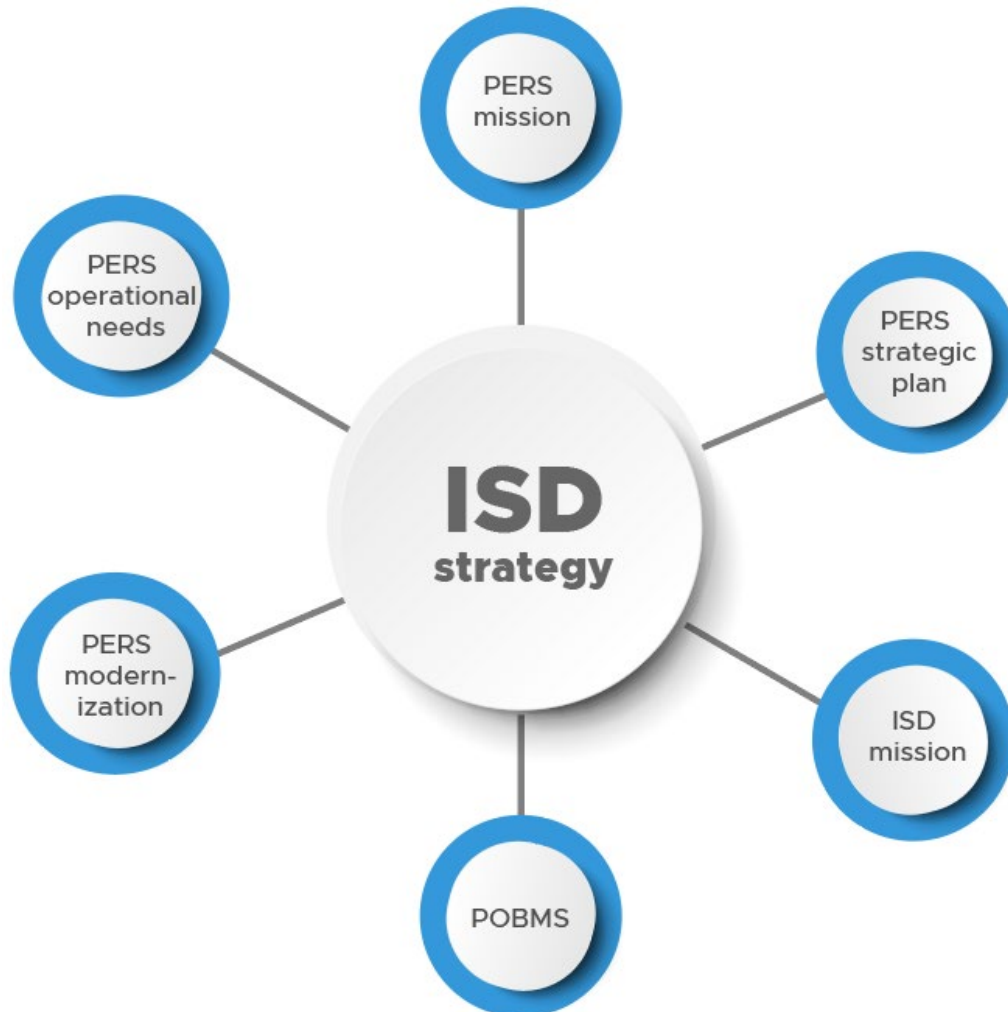
PERS mission

"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 both the ITSP focus area, Strategy 7: Modernization and the section "PERS Modernization Program" on page 22 of this plan for more information on 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

The Governor's "Oregon Agency Expectations" explains what our Governor expects Oregon agencies to do to work together, break down silos, and make enterprise-wide 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 performance 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.

Member and employer needs

PERS members and employers rely on timely, accurate, and accessible services to support retirement planning, reporting, and benefit administration. Their expectations for efficiency, transparency, and digital access continue to grow, shaping ISD's priorities in modernization, data management, and service delivery. By aligning IT strategies with these needs, ISD ensures that technology investments directly improve the experiences of members and employers while maintaining trust in PERS operations.

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 (ITSP) 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 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 (updated in September 2025) defines seven agency-level strategic priorities required for PERS to fulfill its mission and meet the needs of members, employers, and retirees. These seven strategic priorities, along with how IT will support each focus area, are summarized below.

Strategy 1: Organizational Management and Development

Focus area 1: Workforce Development

IT will provide business solutions to PERS HR 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 support for other workforce solutions as necessary.

Focus area 2: Organizational Communication

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

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

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

IT will 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, IT support for the annual PERS Retirement Expo, and support for systems designed for member retirement education and planning.

Focus area 2: Omni-channel Service Delivery

IT will provide business solutions to enhance and secure Online Member Services (OMS), the PERS website, and new educational resources in collaboration with and in support of the PERS Modernization Program.

Strategy 3: Data Consistency

Focus area 1: Data Analytics

PERS is focused on data quality and integrity. In concurrence with that objective, IT will provide business solutions to improve data validation in Employer Data Exchange (EDX) and other sources 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: Maintain jClarety through Modernization

IT will address issues encountered and changes needed for the on-going maintenance of jClarety and its successful operation during the Modernization Program. This includes:

- Prioritizing and resolving technical debt in jClarety.
- Resolving key issues affecting jClarety administration, performance, maintainability, and sustainability in preparation for modernization.
- As needed, refactoring or redesigning operational jClarety processes to improve maintainability and efficiency as well as stabilizing the core application and its supportability.
- Supporting, executing, and deploying necessary system changes in jClarety as mandated by the Legislature.
- Establishing a "cloud-first" strategy using Hybrid Cloud.
- Designing a versatile digital business platform.
- Completing a disaster recovery Warm-site[2] initiative in collaboration with the State Data Center.

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[2] A warm-site refers to a disaster recovery site that is partially equipped with information systems and telecommunications equipment to support operations during a significant disruption.

Focus area 2: IT Workforce Development

IT will continue to implement more strategies for attracting, developing, and retaining talent—endeavoring to enhance the ISD work environment to encourage effective collaboration and innovation. This will be accomplished by deploying tools that support telecommuting, the reduction of silos within the organization, and optimization of team operations. In addition, ISD will improve documentation practices through collaborative platforms and dedicated technical writing support as well as providing next-generation training platforms to meet the demands of digital business optimization.

ISD will launch the ISD Skills Academy to help build workforce capabilities that support modernization and future technology needs. Informed by workforce strategy, skills assessments, and staff input, the program will align training investments with organizational priorities while offering flexible, multi-modal learning opportunities. This will equip staff to adapt to emerging technologies and sustain PERS' mission-driven modernization.

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, organize data, 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 as well as enabling business with secure access to systems and applications during the modernization program.

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.

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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 as determined by the PERS Information Security and Risk Office.

Strategy 7: Modernization

Focus area 1: Modernization

IT will partner with the Modernization Program to replace jClarety with a new COTS pension administration system, aid in the program's efforts to re-engineer Business Processes, and provide tools to help in implementing a Change Management Program.

IT will facilitate the development of key modernization deliverables, including foundational program documents, RFPs and contract awards, a detailed modernization plan with workstreams (system gaps, data readiness, architecture, cloud, integrations, and security), an updated roadmap, a comprehensive resource plan, and a 2026 legislative funding request. IT will also support the creation of current-state business journey maps covering key pension life cycle events, along with documented improvement initiatives to enhance member and employer satisfaction.

Finally, IT will help develop and award an RFP for an organizational change management vendor, create an OCM plan, finalize a resource plan, and prepare a 2027–2029 funding request.

Refer to the section dedicated to the PERS Modernization Program beginning on for further details on ISD's role in this critical strategy.

ITSP communications plan

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

ISD staff

Division meetings.

Email correspondence.

PERS Intranet.
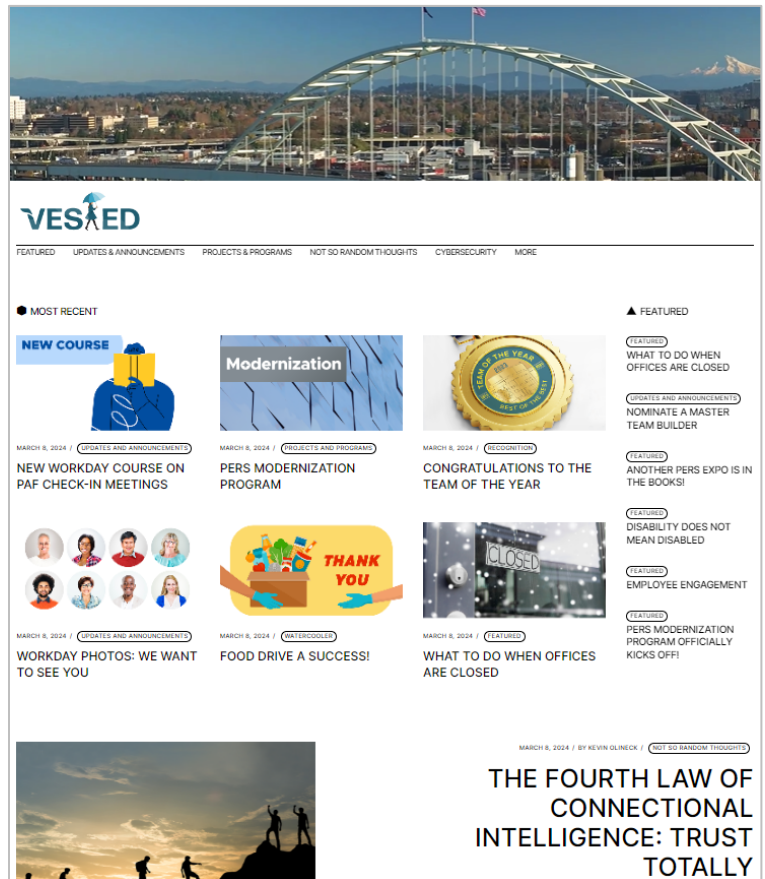
PERS staff

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).

By partnering with the program from strategy through architecture, design, and implementation, and providing support across each sub-project—from initiation to deployment and ongoing operations—ISD will ensure the program achieves its objectives and realizes its intended benefits.

ISD will provide the technical expertise and leadership to deliver a sustainable, adaptable Pension Administration System. This will include driving key activities such as procurement, system design, data integrity, cloud infrastructure, and security, while partnering with business units to re-engineer processes that improve efficiency and service quality. By embedding change management, ISD will also support employees, members, and employers through the transition, ensuring modernization goals are met and long-term success is achieved.

During the upcoming 2025-27 biennium, ISD is positioned to support two projects under the modernization program: Telephony and Hybrid Integration Platform.

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.

Program benefits

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

Program roadmap

(last updated September 2025)

PERS Modernization Program Roadmap
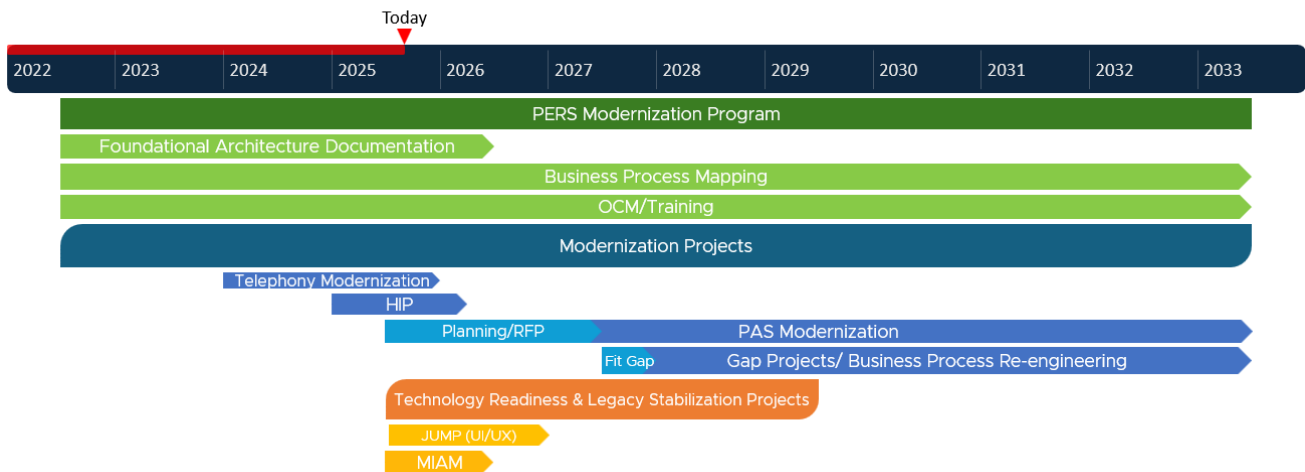
Conclusion

This IT Strategic Plan establishes a clear direction for how technology will enable PERS to achieve its mission and deliver value to the people we serve. The strategies outlined in this plan emphasize modernizing our technology environment, strengthening security and resilience, improving data-driven decision making, and enhancing the digital experience for staff and stakeholders.

Execution of this plan will require collaboration across the agency, disciplined governance, and ongoing measurement of progress. By aligning IT priorities with business needs, we ensure that technology investments provide meaningful impact and long-term sustainability.

This document is not an endpoint but a roadmap. The plan will be reviewed regularly, progress will be tracked and reported, and adjustments will be made as business needs and technologies evolve. Through this commitment, PERS will build a resilient, secure, and future-ready IT foundation that supports both today's operations and tomorrow's opportunities.

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.

ISD Portfolio

Priority	Program/Project Name	Status	End Date	Driven By
84%	HB4045 P&F Age Change Phase II	Active	4/6/2026	External Mandate
83%	Managed Services Migration	Active	1/12/2028	PERS Strategic Plan
83%	PERS Modernization Program	Active	6/30/2031	PERS Strategic Plan
75%	Salem to State Lands Building 2025	Active	8/8/2025	External Mandate
70%	INF Refresh TGD-SLM 23-25	Active	7/31/2025	IT Foundational
70%	Member Identity and Access Mgmt	Active	8/31/2026	Security
69%	Telephony Modernization, Phase I	Active	3/13/2026	PERS Strategic Plan
68%	ACFR 2025	Active	1/8/2026	PERS Strategic Plan
68%	PBTN 2025	Active	12/31/2025	PERS Strategic Plan
66%	Data Clean Implementation	Active	8/12/2025	PERS Strategic Plan
63%	COLA 2025	Active	8/29/2025	OSC Prioritization
61%	Portfolio Intake Process (MVP)	Active	9/10/2025	PERS Strategic Plan
56%	Estimate Tracker Tool	Active	10/10/2025	OSC Prioritization
48%	Expo 2025	Active	11/6/2025	PERS Strategic Plan
45%	MS Windows Server 11 Upgrade	Active	10/7/2025	IT Foundational
1%	jClarety Releases 2025	Active	10/31/2024	OSC Prioritization
69%	SSRS - Development Only	Active	TBD	IT Foundational
68%	SOS Audit Remediation	Active	12/31/2026	PERS Strategic Plan
60%	Workforce Develop - ISD & OSA	Active	6/30/2025	IT Strategic Plan
52%	OSA migration to SQL/AD	Active	12/31/2025	IT Foundational
52%	Azure Commerical Migration	Active	12/31/2024	ISD Project
50%	FN Srvrs to Window Srvr 2022	Active	11/26/2025=MSM; 5/10/2025=Patching	IT Foundational
44%	Section Onboarding Plan	Active	12/31/2025	TOS Initiative
25%	New App Support Implementation	Active	2/28/2026	ISD Project
10%	Boardroom Upgrades	Active	9/30/2025	TOS Initiative
10%	ITAM Program Implementation	Active	9/30/2025	TOS Initiative
0%	Struts v2.5 Development Only	Active	8/31/2025	IT Foundational

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. Note: new legislation and other mandates may occur over the duration of this plan and the IT roadmap will be updated as necessary.

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 enterprise-wide 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) 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 (other than jClarety, which will be replaced with a COTS solution) as independent, discrete business services.

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