

# VENTURA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

## BOARD OF RETIREMENT

### DISABILITY MEETING

JULY 10, 2023

### AGENDA

**PLACE:** Ventura County Employees' Retirement Association  
Second Floor, Boardroom  
1190 S. Victoria Avenue, Suite 200  
Ventura, CA 93003

*The public may listen to the Public Session and offer comments by calling: +1 213-338-8477, using Meeting ID: 825-5251-8786. Persons may also submit written comments to [publiccomment@vcera.org](mailto:publiccomment@vcera.org) prior to and during the Board meeting. Please include your name, agenda item, the last 4 numbers of the telephone number that will be used to call in, and your comment. Public comment emails will be read into the record or summarized if lengthy.*

The Board may take action on any item on the agenda, and agenda items may be taken out of order.

**TIME:** 9:00 a.m.

**ITEM:**

**I. CALL TO ORDER**

A. Roll Call.

**II. APPROVAL OF AGENDA**

**III. CONSENT AGENDA**

*Notice: Any item appearing on the Consent Agenda may be moved to the Regular Agenda at the request of any Trustee who would like to propose changes to or have discussion on the item. Note that approval of meeting minutes are now part of the Consent Agenda.*

A. Receive and File Pending Disability Application Status Report.

B. Approve Business Meeting Minutes of May 22, 2023.  
***To be Provided.***

**IV. APPLICATIONS FOR DISABILITY RETIREMENT**

A. Application for Service-connected Disability Retirement—Sabharwal, Negar; Case No. 18-024.

1. Proposed Findings of Fact, Conclusions of Law and Recommended Decision to Deny the Application for Service-connected Disability Retirement, filed by Hearing Officer Deborah Wissley, dated May 10, 2023.

2. Applicant's Objections to the Hearing Officer's Report, filed by Thomas Wicke, Applicant's Attorney, dated May 30, 2023.

IV. APPLICATIONS FOR DISABILITY RETIREMENT (continued)

3. County of Ventura-Risk Management's Response to Applicant's Objections, filed by Stephen Roberson, Attorney for Respondent, dated June 6, 2023.
  4. Application for Service-connected Disability Retirement, filed by Applicant's Former Attorney, Joon Kim, dated September 26, 2018.
  5. Hearing Notice, dated June 21, 2023.
- B. Application for Service-connected Disability Retirement—Hull, Henry; Case No. 21-006.
1. Staff Recommendation to Grant the Application for Service-connected Disability Retirement, dated July 3, 2023.
  2. County of Ventura-Risk Management's Response to VCERA's Preliminary Recommendation, dated June 2, 2023.
  3. Supporting Documentation for Staff Recommendation.
  4. Application for Service-connected Disability Retirement, filed by Applicant's Former Attorney, Russell Ghitterman, dated April 5, 2021.
  5. Hearing Notice, dated July 3, 2023.
- C. Application for Service-connected Disability Retirement—Horton, Guy; Case No. 21-018.
1. Staff Recommendation to Grant the Application for Service-connected Disability Retirement, dated June 13, 2023.
  2. Supporting Documentation for Staff Recommendation.
  3. Application for Service-connected Disability Retirement, filed by Applicant's Attorney, Thomas Wicke, dated June 17, 2021.
  4. Hearing Notice, dated June 13, 2023.
- D. Application for Service-connected Disability Retirement—Fisher, Mark; Case No. 21-023.
1. Staff Recommendation to Grant the Application for Service-connected Disability Retirement, dated June 29, 2023.
  2. Supporting Documentation for Staff Recommendation.
  3. Application for Service-connected Disability Retirement, filed by Applicant's Attorney, Thomas Wicke, dated August 6, 2021.
  4. Hearing Notice, dated June 29, 2023.

V. OLD BUSINESS

- A. Status Update – David Maher (Case #20-009: Closed).
1. Staff Memo Regarding Case Status Update, dated July 10, 2023.
  2. Board Hearing Decision Notice Follow-Up Letter to Applicant, dated May 2, 2023.
  3. Application for Service-connected Disability Retirement, filed by Applicant on March 10, 2020, with Amendment to include Application for Nonservice-connected Disability Retirement.
  4. Hearing Notice, dated June 29, 2023.

VI. NEW BUSINESS

- A. Renewal of Hearing Officer Contracts for Fiscal Year 2023-24.  
**RECOMMENDED ACTION: Approve.**
1. Staff Letter from Retirement Administrator.
  2. Proposed Contract (Red Line).
  3. Proposed Contract (Clean).
- B. New Model Disability Retirement Hearing Rules Review in Advance of July 24, 2023 Recommendation.
1. Staff Letter from Retirement Administrator.
  2. New Disability Hearing Rules.
  3. Communication with County of Ventura Regarding Rules.
- C. Authorization for Chief Technology Officer to Attend the Gartner IT Symposium Conference, October 16 - 19, 2023, in Orlando, Florida.  
**RECOMMENDED ACTION: Approve.**
1. Staff Letter from Chief Technology Officer.
  2. Gartner IT Symposium 2023 Agenda.
- D. Authorization for Chief Financial Officer (CFO) to Attend the Public Pension Financial Forum (P2F2) Conference, October 8 - 11, in Denver, Colorado.  
**RECOMMENDED ACTION: Approve.**
1. Staff Letter from Retirement Administrator.
  2. Attachment A - P2F2 Conference Detailed Estimate of Travel Expense.
  3. Attachment B – P2F2 Conference at a Glance (Agenda).

VI. **NEW BUSINESS** (continued)

E. Board Request to Discuss VCERA's Agenda Management Software.  
**RECOMMENDED ACTION: Provide Feedback to Staff.**

1. Staff Letter from Chief Technology Officer.

F. Designation of Representative(s) for Labor Negotiations with Prospective Unrepresented Employee.

G. Consider and Take Possible Action to Set Employment Terms and Compensation for Interim Retirement Administrator and Authorize Chair or Ad Hoc Committee to Finalize Appointment.

VII. **CLOSED SESSION**

A. It is the Intention of the Board of Retirement to Meet in Closed Session, Pursuant to Government Code Section 54957(b)(1), to Discuss the Following Items.

***Time Certain at 10:30 a.m.***

1. Public Employee Appointment.  
Title: Interim Retirement Administrator.

2. Conference with Labor Negotiators, Govt. Code Section 54957.6  
Prospective Unrepresented VCERA Employee:  
Interim Retirement Administrator

VIII. **INFORMATIONAL**

A. Letter from Barbara Macri-Ortiz Regarding Ventura County's Request for VCERA Board Review of Procedures in Fast Track Cases, dated July 3, 2023.

B. PBI Research Services – Global Moveit Transfer Cyberattack.

IX. **PUBLIC COMMENT**

X. **STAFF COMMENT**

XI. **BOARD MEMBER COMMENT**

XII. **ADJOURNMENT**



July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 South Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: RENEWAL OF HEARING OFFICER CONTRACTS FOR FISCAL YEAR 2023-24**

Dear Board Members:

Due to an administrative oversight, staff's request for Board approval of the hearing officer contract was not placed on the June 26, 2023 agenda. The contracts for members of VCERA's hearing officer panel expired on June 30, 2023, though without operational impact. Below is a list of the panel members, all of whom have heard disability cases on VCERA's behalf.

Irene Ayala	Robert Klepa
Humberto Flores	John Rosenthal
Catherine Harris	Deborah Wissley

A panel consisting of these six (6) members provides VCERA staff with options in managing disability case workloads that require the services of a hearing officer. On average, each hearing officer conducts one disability hearing for VCERA per year. Two members of the panel have experience with and have been assigned administrative appeals in addition to disability hearings, and staff anticipates a continued need for such services from time to time.

Provided for your review is a pro forma hearing officer contract. Staff prepared contracts for the individuals named above and has already received signed copies. The contract terms remain unchanged from the prior fiscal year, except for: (1) Recitals, first paragraph, added reference to administrative appeals; (2) Section 7(a), added language that hearing officers shall bill VCERA in increments no greater than one-quarter (0.25) of an hour; and (3) Section 7(d), added language governing compensation to hearing officer in the event of dismissal or withdrawal of an administrative appeal.

**RECOMMENDATION: AUTHORIZE THE RETIREMENT ADMINISTRATOR TO EXECUTE UPDATED FISCAL YEAR 2023-2024 CONTRACTS FOR THE SIX LISTED MEMBERS OF VCERA'S HEARING OFFICER PANEL.**

Hearing Officer Renewals

July 10, 2023

Page 2 of 2

Staff would be happy to answer any questions you may have at the July 10, 2023 meeting.

Sincerely,

A handwritten signature in cursive script that reads "Linda Webb".

Linda Webb

Retirement Administrator

Attachments

## REFEREE SERVICES AGREEMENT

THIS AGREEMENT, to be effective as of the 1<sup>st</sup> day of July 2023, by and between the BOARD OF RETIREMENT (hereinafter referred to as "Board") of the VENTURA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION (hereinafter referred to as "Association"), and \_\_\_\_\_ (hereinafter referred to as "Contractor").

### Recitals

Pursuant to the provisions of section 31533 of the Government Code, the Board is authorized to provide for the conduct of hearings by a referee in connection with the determination of **administrative appeals and** applications of members of the Association for disability benefits under the County Employees Retirement Law of 1937 (ch. 3 of div. 4 of tit. 3 of the Government Code).

Contractor has experience with respect to evidentiary hearings and is a member of the State Bar of California (active membership no. \_\_\_\_\_).

The Board intends to retain the services of Contractor as a referee to conduct said hearings.

IT IS THEREFORE AGREED:

### Services To Be Performed

1. Contractor agrees, when available, to act as a referee in connection with the conduct of hearings and the review of cases pursuant to section 31533 of the Government Code.
2. Such services shall be performed in accordance with the applicable provisions of the County Employees Retirement Law of 1937, as amended, and pursuant to any specific requirements imposed by the Board, and such services shall include, but shall not be limited to, the conduct of hearings, the review of evidence, and the rendering of a written report which shall contain proposed findings of fact, conclusions of law, and a recommended decision, provided that said written report shall be rendered within ninety (90) days after the case has been submitted to Contractor and include service of said written report to all parties.
3. Contractor may request an extension from the Board or the Retirement Administrator of any time limitation established in this contract, on an individual case basis, when done in writing, and upon a showing of "good cause" as to said request.
4. If Contractor requires more than forty (40) billable, non-travel hours to complete a hearing assignment, Contractor will provide written notice to VCERA staff concerning the reason(s) for the additional time required.
5. Contractor shall be familiar with the Association's "Disability Hearing Procedures."
6. The Board is under no obligation to submit cases to the Contractor, but it may do so at its pleasure.

Compensation

7. Compensation to Contractor for the above services shall be at the following rates:
- (a) If the written report is rendered within ninety (90) days after the case has been submitted, or within any time extension granted by the Board or the Retirement Administrator pursuant to paragraph 3 above, Contractor shall be entitled to One Hundred and Ninety Dollars (\$190.00) per hour, **billed in increments no greater than one-quarter (0.25) of an hour;**
  - (b) Contractor shall be compensated for necessary and reasonable travel time to and from Ventura County pursuant to the rate set forth above;
  - (c) If the written report is not rendered within ninety (90) days from the date the case has been submitted, or within any time extension granted by the Board or the Retirement Administrator pursuant to paragraph 3 above, the Board or the Retirement Administrator may transfer the case to another referee, in which event the original referee shall not receive any fee for services performed in connection with said case;
  - (d) If a **disability** hearing scheduled before the Contractor is continued or cancelled less than fourteen (14) calendar days before the date agreed upon by all parties, or set by the Board, VCERA shall pay to the Contractor the sum of Eight Hundred and Seventy-Five Dollars (\$875.00), which includes all costs associated with the hearing, including, but not limited to, travel time, mileage reimbursement and other associated hearing costs. **In the event of a dismissal or withdrawal of an administrative appeal requiring a hearing in which the Board has provided for a fully-briefed appeal procedure, Contractor shall be compensated for actual time spent as of the date of receipt of notice from VCERA of dismissal or withdrawal.**

Term of Contract

8. This agreement shall apply for all services provided by the Contractor, performed on or after July 1, 202~~3~~<sup>3</sup>, and shall continue through June 30, 202~~3~~<sup>4</sup>, at which time it shall terminate. However, either party may terminate this agreement sooner upon ten (10) days written notice to the other party. Any cases pending before the Contractor at the time of termination shall be immediately transferred to the Board. If this agreement is terminated at the request of the Contractor, the Contractor shall not receive any fees for services performed in connection with any cases that are pending as of the effective date of the termination, except those wherein a written report has been provided to the Board. If this agreement is terminated at the request of the Board, the Contractor shall be entitled to the compensation earned prior to the effective date of termination as provided for in this agreement, computed pro rata up to and including that date. The Contractor shall be entitled to no further compensation as of the date of termination.

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Linda Webb, Retirement Administrator

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Contractor



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Date: \_\_\_\_\_

By: \_\_\_\_\_  
Linda Webb, Retirement Administrator

Date: \_\_\_\_\_

By: \_\_\_\_\_  
Contractor



July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 South Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: NEW MODEL DISABILITY RETIREMENT HEARING RULES IN ADVANCE OF 7/24 RECOMMENDATION**

Dear Board Members:

At the July 24, 2023, VCERA Business Meeting, staff will be bringing a recommendation for adoption of new Disability Hearing Rules, which are attached. Though originally scheduled for today's agenda, staff has postponed the item to July 24 in order for the County of Ventura to have additional time to review and to meet with staff to provide feedback on these new rules, which were first provided to them on June 9<sup>th</sup>. In the meantime, staff is working with the County to schedule that meeting to allow for a dialogue (see attached exchanges on these efforts).

#### Background

In July 2020, VCERA's "new model" was authorized by the Board, in part, to provide more expedited determinations on disability applications. However, as VCERA's model has matured, it has become increasingly evident that for cases that are ultimately referred to a hearing officer, the driving cause of delays under the "old model" has been replicated in the "new model."<sup>1</sup>

#### Current Hearing Delays

Five (5) of VCERA's oldest disability cases were directed to hearing in 2021 or 2022. Of the five, only one (Thin) has gone to hearing—taking 13 months to reach this milestone from the time staff shared the Administrative File with the parties. The remaining four (4) cases do not yet have a hearing date set, as summarized below:

- Allan Thin, 13 months;
- Geoff Bruton, 18+ months;
- John Muhilly, 15+ months;
- Stephanie Solace, 12+ months; and
- James Myers, 8+ months

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<sup>1</sup> While some delay under the old model resulted from VCERA accepting applications before the member's condition had become permanent, delays due to this factor were not the subject of objection from applicants, as the delay provided the applicant with additional time to obtain evidence to establish entitlement to benefits. The new model eliminated this delay factor by requiring evidence of permanency for acceptance of an application.

For each of these cases, VCERA has been ready to schedule a hearing date within a reasonable time after the hearing officer assignment. The County has declined to set a hearing date due to its ongoing discovery. Specific hearing dates have been discussed but not agreed upon.

The Board's Responsibility for Prompt Delivery of Benefits

Pursuant to the California Constitution, the retirement board has "the sole and exclusive responsibility to administer the system in a manner **that will assure prompt delivery of benefits** and related services to the participants and their beneficiaries." Cal. Const. Art. XVI §17(a) [emphasis added].

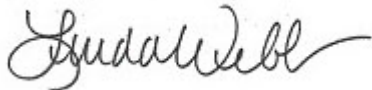
New Model Hearing Rules

To correct the inefficiencies noted above, staff proposes the Board adopt New Model Hearing Rules, applicable only to new-model cases directed to hearing. These proposed Hearing Rules provide a reasonable pre-hearing framework for the parties to efficiently and expeditiously prepare for hearing. Such a framework is noticeably absent from the Disability Hearing Procedures ("DHPs"), which were last revised in 1999.

A visual representation of the proposed rules in the form of a timeline is shown on the following page.

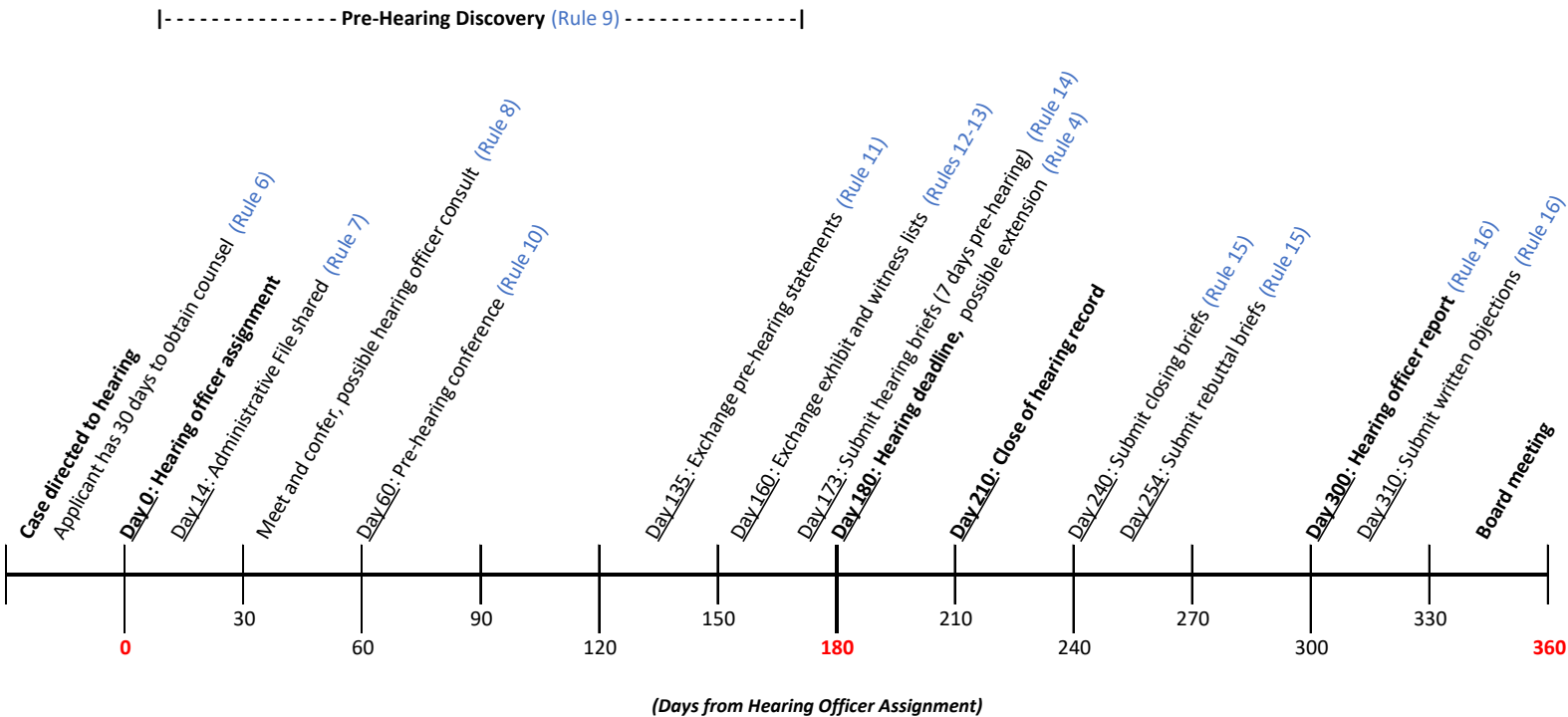
Staff will be available to answer questions at the July 10, 2023, Board meeting.

Sincerely,

A handwritten signature in cursive script, appearing to read "Linda Webb".

Linda Webb  
Retirement Administrator

# New Model Hearing Rules Timeline



## **VCERA New Model Disability Retirement Hearing Rules**

1. The VCERA New Model Disability Retirement Hearing Rules (“Hearing Rules”) set forth in this document shall apply only to applications for disability retirement received under VCERA’s Disability Retirement Process Document (“New Model”), as authorized by the Board of Retirement in July 2020. The Hearing Rules are intended to be harmonious in purpose and practice with VCERA’s Disability Hearing Procedures (“DHPs”), last revised in 1999, with respect to the purpose set forth below.
2. The Hearing Rules and the DHPs share the same purpose, as set forth in Section 1 of the DHPs: *“to provide an equitable, fair and impartial method for acting upon applications for rights, benefits and privileges under the County Employees’ Retirement Law of 1937, as amended, to the end that applications for disability retirement may be expeditiously processed with a minimum lapse of time, and that when a hearing is required, all parties will have notice of the hearing and an opportunity to appear before the Board or duly appointed Hearing Officer to present their cases.”*
3. Parties to the evidentiary hearing include the applicant and VCERA. In addition, as set forth in Section 2(b) of the DHPs, the County of Ventura and participating districts, as non-applicant employers, are authorized to participate as parties to an evidentiary hearing, as described in this document, regardless of whether the employer agrees with or objects to VCERA’s Final Recommendation on an application for disability retirement.
4. To achieve the explicit objective of the New Model Hearing Rules and the Disability Hearing Procedures that disability retirement applications be “expeditiously processed with a minimum lapse of time,” evidentiary hearings for New Model cases shall be commenced on or before 180 days after service of the Notice of Hearing Officer Assignment. A party may submit a one-time written request to VCERA’s Retirement Administrator for an extension of time not to exceed 30 days. The Retirement Administrator may grant the requested extension upon a showing of good cause, pursuant to the Retirement Administrator’s authority as set forth in Section 5 of the DHPs.<sup>1</sup>
5. If the hearing is not commenced by 5:00 p.m. on the 180<sup>th</sup> day, or the date to which the deadline was extended under these Hearing Rules, the Referee’s jurisdiction shall lapse. No later than thirty (30) days after the lapse of jurisdiction, the Referee shall provide to the Board a written report setting forth the reasons the hearing was not brought to a timely conclusion, along with the Referee’s recommendations regarding further proceedings. If said reasons include a party’s unreadiness or unwillingness to proceed,

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<sup>1</sup> Section 5 states, “Unless otherwise directed by the Board, hearings held before the Board, or Hearing Officer, shall be set on a date to be determined by the Administrator or his/her designee, in consultation with the parties or their designated representatives, but not sooner than sixty (60) days following service of notice, unless an earlier date is otherwise agreed to by all parties.”

the Board may in its discretion impose penalties on the party or parties for noncompliance, including, but not limited to, exclusion or limited admission of evidence, and dismissal of the application. In addition, the Board may (a) reinstate the Hearing Officer's jurisdiction with a new hearing commencement deadline; (b) assign a new Hearing Officer with a new 180-day or other revised hearing commencement deadline; (c) set the hearing before the Board; or (d) take any other action consistent with applicable law.

6. As of the date of VCERA's Final Recommendation to deny an application, or as of the date of the Board's decision to direct a case to evidentiary hearing, the applicant shall have thirty (30) days to retain legal representation before the matter will be assigned to a Hearing Officer, pursuant to Section 4(b) of the DHPs.
7. VCERA shall distribute to the parties the Administrative File for an application for disability retirement no later than fourteen (14) days after service of the Notice of Hearing Officer Assignment.
8. The parties shall meet and confer after issuance of the Notice of Hearing Officer Assignment to seek agreement on pre-hearing and hearing-related procedural matters such as: setting the hearing date pursuant to Section 4 above, duration of the hearing, written or oral closing arguments, agreed upon methods of service, and any other applicable matters. If, after meeting and conferring in good faith, the parties cannot agree on a matter, they shall promptly notify the Hearing Officer of the disputed matter(s). The Board of Retirement expressly authorizes the Hearing Officer to make binding determinations on disputed procedural and/or evidentiary issues arising between the parties.
9. Informal discovery and exchange of information between the parties is encouraged. In the event of a pre-hearing discovery dispute, the Hearing Officer, on his or her own motion or upon the written noticed motion of a party, may make appropriate orders concerning discovery.
10. There shall be a pre-hearing conference involving the parties and the Hearing Officer for all cases in which an applicant is in pro per to ensure the rights and responsibilities of the applicant are properly and timely conveyed. This pre-hearing conference shall be held no later than sixty (60) days after the issuance of the Notice of Hearing Officer Assignment, unless waived by the applicant or otherwise ordered by the Hearing Officer.
11. No later than forty-five (45) days before the date of the hearing, the parties shall serve a pre-hearing statement upon the Hearing Officer and the other parties. The pre-hearing statement shall contain the following:

- a. A statement of the party's issues and contentions;
  - b. A list identifying the documentary exhibits the party intends to present at hearing, including medical reports and depositions of medical witnesses on which the party will rely at hearing. Each document shall be described with sufficient information to reasonably identify the document. Copies of the documentary exhibits are encouraged, but not required, to be exchanged;
  - c. The names and contact information of any lay witnesses whose testimony the party intends to present at the hearing, and a summary of each witness's expected testimony;
  - d. The name of each expert witness the party intends to call at hearing along with a brief statement of the opinion the expert is expected to give; and
  - e. A list and summary of any affidavits the party proposes to introduce as evidence at the hearing.
12. At least twenty (20) days before the hearing, the parties shall submit to the Hearing Officer and all other parties an exhibit list and copies of exhibits intended to be introduced at the hearing. The exhibit list shall contain enough information about each exhibit to reasonably identify the document. Except on rebuttal, or as otherwise authorized by the DHPs, no party will be allowed to offer an exhibit at hearing that is not identified on an exhibit list without a showing of good cause as to why the existence of that exhibit was not earlier discovered and disclosed through the exercise of due diligence.
13. At least twenty (20) days before the hearing, the parties shall submit to the Hearing Officer and all other parties a witness list identifying witnesses expected to be called at the hearing. The witness list shall contain the names and identities of witnesses and a summary of each witness's expected testimony. If a witness list contains the names of expert witnesses, the witness list shall also include a brief statement of the opinion each expert is expected to give and shall be accompanied by a copy of each expert's curriculum vitae. Except on rebuttal or as otherwise authorized by the DHPs, no party will be allowed to call a witness who is not identified on a witness list without a showing of good cause as to why the identity of that witness was not earlier discovered and disclosed through the exercise of due diligence.
14. Unless otherwise ordered by the Hearing Officer, hearing briefs are optional. If a party elects to submit a hearing brief, it shall be submitted to the Hearing Officer and served on all other parties no later than seven (7) days before the hearing.
15. If a party elects to submit a closing brief, the brief shall be submitted to the Hearing Officer and served on the parties no later than thirty (30) days after either the close of the hearing record or service of the hearing transcripts, whichever is later. Rebuttal briefs shall be submitted to the Hearing Officer and served on the parties no later than fourteen (14) days after service of the closing brief.



16. The Hearing Officer shall serve on the parties the Proposed Findings of Fact and Recommended Decision within ninety (90) days of the closing of the hearing record, pursuant to Section 7 of the DHPs. Any post-hearing briefing shall not extend the date the Proposed Findings of Fact and Recommended Decision is due. The parties shall then have ten (10) days, inclusive of the tenth day, to submit written objections thereto for inclusion in the materials to be considered by the Board of Retirement. The Board may, upon a written showing of good cause, accept and consider any objections filed after the 10-day deadline under this paragraph.
17. Nothing in these Hearing Rules is to be construed as preventing the parties from stipulating to lesser intervals than those described above. The Hearing Officer may for good cause shown and after notice and an opportunity to be heard, shorten or lengthen the times specified above.
18. The Hearing Rules are effective upon adoption by the Board of Retirement. The Hearing Rules may be amended by the Board of Retirement at any time to better achieve the stated purposes of the DHPs.

**From:** [Webb, Linda](#)  
**To:** [Laveau, Catherine](#)  
**Cc:** [Vencel, Josiah](#); [Herron, Amy](#); [Nemiroff, Lori](#); [Atin, Shawn](#); [Pettit, Mike](#); [Gardner, Emily](#)  
**Subject:** RE: New Model Hearing Rules  
**Date:** Wednesday, July 5, 2023 2:30:00 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)

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Catherine,

In response to the County's request for more time and a meeting, we will agendaize this item for proposed action for 7/24 instead of 7/10, and just provide the proposed hearing rules on 7/10 in advance of later consideration. Monday will see a non-action item, providing the Board with the document, and the developments to date.

We are making every effort to accommodate a meeting in advance of Board action. But this item should be heard before the Board goes dark in August, and not AFTER my departure. As VCERA's Administrator, I have been heavily involved in the work and development of these procedures, and though we believe July 10 is reasonable with all factors considered, we are willing to postpone two weeks. Please consider these potential meeting dates and times:

- Fri, 7/7: 10 am, 11 am
- Mon, 7/10: 3 or 3:30 pm
- Tue, 7/11: 10 am, 2:30 pm
- Wed, 7/12: 9 am, 10 am, 4 pm
- Thu, 7/13: 2:30 pm, 3:30 pm
- Fri, 7/14: 9 am, 10 am, 2 pm, 3 pm, 4 pm

We look forward to meeting and hearing your feedback.

**Linda Webb**  
Retirement Administrator



**Ventura County Employees' Retirement Association**

1190 South Victoria Avenue, Suite 200  
Ventura, CA 93003

Direct: 805.339.4262 | Administration Fax: 805.339.2502  
Main Line: 805.339.4250 | Department Fax: 805.339.4269

[Email](#) | [Website](#)

---

**From:** Laveau, Catherine <Catherine\_Laveau@ventura.org>  
**Sent:** Thursday, June 29, 2023 4:46 PM  
**To:** Webb, Linda <Linda.Webb@ventura.org>  
**Cc:** Vencel, Josiah <Josiah.Vencel@ventura.org>; Herron, Amy <Amy.Herron@ventura.org>; Nemiroff, Lori <Lori.Nemiroff@ventura.org>; Atin, Shawn <Shawn.Atin@ventura.org>; Pettit, Mike <Mike.Pettit@ventura.org>; Gardner, Emily <Emily.Gardner@ventura.org>  
**Subject:** RE: New Model Hearing Rules

Linda,

Thank you for your response of 6/20/23. These are complex and nuanced issues and is why we believe it necessitates a group discussion versus trying to capture all the issues in emails back and forth. However, based upon your 6/20/23 response it was our understanding that you intend to proceed to the Board on July 10<sup>th</sup> regardless of the County's request to extend to the next disability retirement meeting in September. We would be happy to provide several dates in July and August where we have availability to meet and sufficient opportunity to consider the outcomes of those meetings in our responses to the Board.

Unfortunately, none of the dates or times you have proposed are either available for our staff or allow sufficient time for VCERA administration's consideration of our concerns prior to the July 10, 2023, meeting. If you are denying the County's request to move the matter, we will proceed with preparing a response and will provide as of the extended deadline of July 10, 2023.

Thank you,

Catherine Laveau  
Senior Deputy Executive Officer  
County Executive Office/Risk Management

800 S. Victoria Avenue  
Ventura, CA. 93009  
Direct Dial: (805) 662-6540  
Main Line: (805) 654-3197  
[Catherine.Laveau@ventura.org](mailto:Catherine.Laveau@ventura.org)



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**From:** Webb, Linda <[Linda.Webb@ventura.org](mailto:Linda.Webb@ventura.org)>  
**Sent:** Wednesday, June 28, 2023 4:03 PM  
**To:** Laveau, Catherine <[Catherine\\_Laveau@ventura.org](mailto:Catherine_Laveau@ventura.org)>  
**Cc:** Vencel, Josiah <[Josiah.Vencel@ventura.org](mailto:Josiah.Vencel@ventura.org)>; Herron, Amy <[Amy.Herron@ventura.org](mailto:Amy.Herron@ventura.org)>; Nemiroff, Lori <[Lori.Nemiroff@ventura.org](mailto:Lori.Nemiroff@ventura.org)>; Atin, Shawn <[Shawn.Atin@ventura.org](mailto:Shawn.Atin@ventura.org)>; Pettit, Mike <[Mike.Pettit@ventura.org](mailto:Mike.Pettit@ventura.org)>; Gardner, Emily <[Emily.Gardner@ventura.org](mailto:Emily.Gardner@ventura.org)>  
**Subject:** RE: New Model Hearing Rules

Catherine,

As I have not heard back from you regarding potential meeting dates, allow me to suggest some potential ones.

- Friday, June 30<sup>th</sup>, 3 pm
- Wed., July 5<sup>th</sup>, 10 am, or 2 pm, or 3 pm
- Thurs, July 6<sup>th</sup>, 9 am, or 2 pm
- Friday, July 7<sup>th</sup>, Open to Suggested times

**Linda Webb**  
Retirement Administrator



**Ventura County Employees' Retirement Association**

1190 South Victoria Avenue, Suite 200  
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Direct: 805.339.4262 | Administration Fax: 805.339.2502  
Main Line: 805.339.4250 | Department Fax: 805.339.4269

[Email](#) | [Website](#)

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**From:** Webb, Linda

**Sent:** Tuesday, June 20, 2023 11:06 AM

**To:** Laveau, Catherine <[Catherine\\_Laveau@ventura.org](mailto:Catherine_Laveau@ventura.org)>

**Cc:** Vencel, Josiah <[Josiah.Vencel@ventura.org](mailto:Josiah.Vencel@ventura.org)>; Herron, Amy <[Amy.Herron@ventura.org](mailto:Amy.Herron@ventura.org)>; Nemiroff, Lori <[Lori.Nemiroff@ventura.org](mailto:Lori.Nemiroff@ventura.org)>; Atin, Shawn <[Shawn.Atin@ventura.org](mailto:Shawn.Atin@ventura.org)>; Pettit, Mike <[Mike.Pettit@ventura.org](mailto:Mike.Pettit@ventura.org)>; Gardner, Emily <[Emily.Gardner@ventura.org](mailto:Emily.Gardner@ventura.org)>

**Subject:** RE: New Model Hearing Rules

Catherine,

I have responded to your email remarks and points below in [blue](#).

Thank you for the email. This is a substantive change, and your email is the first time I am aware that anyone at the County has been notified of your intention to bring this change before the Board. [Yes, it is certainly the first time that we have notified the County of our intention to propose a solution to the delay problem that has been identified and raised by trustees on several occasions in open meetings at which the County was present – which is why we gave the professional courtesy of providing the proposed hearing rules a full month ahead of taking it to the Board.](#)

We are, as always, happy to discuss areas of concern and to explore opportunities at improvement within the new process.

[We certainly welcome your input and are willing to answer your questions and meet prior to taking it to the Board.](#)

However, the County does not agree with your representation of patterns under the old or new model.

[I'm confused by this statement. In fact, I just re-read my original email twice to try to identify](#)

the “representation” that could be the source of disagreement. We are simply relating facts about the current situation, citing specific cases with their corresponding delays, restating the duties of the Board and VCERA’s obligations re: due process for applicants. Can you help me understand what “representation” the County disagrees with in my email?

We think that for the parties to move forward collaboratively the best place to start is through dialogue to understand the root of the concern, and to explore ways in which we might agree to resolve those issues.

Great, we continue to be open to dialogue. But I’m concerned that you don’t consider three weeks’ advance notice to allow for questions and input to be what collaboration looks like. I would be happy to extend the time for your review all the way up to the actual July 10 meeting.

The root of the problem is plainly stated in my email: our repeated efforts to get hearings on calendar and working with your counsel have been unsuccessful, even in getting an *estimated* range of potential hearing dates in the future. We have documentation regarding these efforts on each of the cases listed, where our counsel has tried earnestly to speed things along but has repeatedly heard from Mr. Roberson that discovery is not only ongoing, but provides no projected dates for when the County’s discovery process might be complete for these long-awaited hearings. My understanding is that both you and Mr. Roberson have both voiced your belief that the County’s discovery period delays have been reasonable; while we acknowledge that some delays fall under the heading of “just cause,” they should not be without limit. These new rules balance discovery rights against due process rights. Our efforts are in no way intended or considered to be punitive – we simply have a duty to process disability applications in a timely manner and make this a priority for our members.

Beyond that, since we were not aware this was an issue, you were looking to move before the Board until late last Friday, we must respectfully request additional time to review the 5 cases you reference in conjunction with the proposed changes.

Respectfully, the problem with delays in getting evidentiary hearings set has been identified and raised by trustees on several occasions in open meetings at which the County was present, and we provided our pending recommendation a full month ahead of the Board meeting. As for reviewing the cases, the County’s counsel Mr. Roberson can fill you in on the ongoing dialogue he and VCERA’s disability counsel have had these past months on the cases we cited. I can provide the documentation of our efforts with him to expedite, but I’m sure you’d rather speak to him yourself.

We believe it is important to all stakeholders to ensure that information provided to the Board is accurate and complete and believe a 2-week timeframe does not allow for comprehensive dialogue between the parties and a complete review of the issues you have raised.

Please identify what you believe might be inaccurate. My email was fairly brief, as are the proposed hearing rules attached. As for stakeholders, the applicants are voicing their concerns

and frustrations to VCERA, and their due process rights will be in jeopardy if we do not take steps to protect them – and that’s what we are doing. If you believe the timelines outlined in the proposed hearing rules to be unreasonable, please be specific about that because this is exactly why we provided our plan well in advance. Extending the requested input up until the meeting gives a full four weeks. July 10<sup>th</sup> is the last disability meeting before the Board goes dark in August, and I do not believe further delay is appropriate. Keep in mind please, this is a change to VCERA’s own model, not a negotiation. We are happy to meet and hear your concerns between now and then. Please provide some availability dates so we can accommodate such a meeting. We will make that a priority.

This is a significant change which we think requires a careful and prudent approach among the parties prior to bringing the matter before the Board.

I completely agree, and I can assure you that the pending proposal to our Board was developed through careful and prudent analysis, consultation with both our disability and General counsels, and designed to do one specific thing: expedite the hearing process, which at present is not serving our members as it should. Again, I must respectfully remind you that this is not a “collaboration”, as our roles and responsibilities are not aligned, but a high-priority proposed improvement from VCERA staff to the VCERA Board on its disability model. We believe we are appropriately giving notice to the County to allow for feedback before we proceed, and we look forward to answering any questions you have pertaining to Hearing Rules.

Based upon the above, we would ask for a meeting with staff over the next few weeks to dialogue on this issue.

Again, we welcome that discussion and look forward to receiving your proposed dates between now and July 10<sup>th</sup>.

Thereafter, the County would be happy to provide feedback and commentary specific to that discussion and provide that information on or before August 1, 2023. This would allow staff the opportunity to respond or meet with the County specific to that response during the month of August when the Board is dark, and still have sufficient time to place it on the Board’s agenda for September.

We make efforts to provide extra time for response when the County has requested, and we are giving ample time for review in this instance. Put simply, I do not consider it reasonable for VCERA staff to delay taking such an important item to the Board. As you pointed out, your request would push into early September, while the goal is to expedite the process. Meanwhile, the applicants continue to wait for their hearings and have asked specifically that VCERA address the delay. I recognize you may not agree with me; however, I respectfully assert that it’s imprudent to delay our efforts to stop ***delays themselves***.

The same day your email arrived, the County bypassed VCERA staff and sent a request to the entire VCERA Board for an immediate consideration to change a decades-long step in the

disability retirement process (so under BOTH models) to be placed at the next Board meeting on June 26 – less than 2 weeks away – without first requesting review or input from VCERA. I'm compelled to point out this particular request is in sharp contrast to your pending request that VCERA delay taking our hearing rules proposal to our Board on July 10. I hope you recognize the mixed messaging we are receiving from the County about collaboration prior to requesting Board action.

We look forward to having the opportunity to work with the staff collaboratively in addressing this area of concern.

So do we, and we will do our best to accommodate a meeting on this issue prior to July 10, 2023. Whether the County is available to meet with us before then or not, as always, concerns can be presented directly to the Board on that day.

*Linda*

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**From:** Laveau, Catherine <[Catherine\\_Laveau@ventura.org](mailto:Catherine_Laveau@ventura.org)>

**Sent:** Wednesday, June 14, 2023 12:16 PM

**To:** Webb, Linda <[Linda.Webb@ventura.org](mailto:Linda.Webb@ventura.org)>

**Cc:** Vencel, Josiah <[Josiah.Vencel@ventura.org](mailto:Josiah.Vencel@ventura.org)>; Herron, Amy <[Amy.Herron@ventura.org](mailto:Amy.Herron@ventura.org)>; Nemiroff, Lori <[Lori.Nemiroff@ventura.org](mailto:Lori.Nemiroff@ventura.org)>; Atin, Shawn <[Shawn.Atin@ventura.org](mailto:Shawn.Atin@ventura.org)>; Pettit, Mike <[Mike.Pettit@ventura.org](mailto:Mike.Pettit@ventura.org)>; Gardner, Emily <[Emily.Gardner@ventura.org](mailto:Emily.Gardner@ventura.org)>

**Subject:** RE: New Model Hearing Rules

Linda,

Thank you for the email. This is a substantive change, and your email is the first time I am aware that anyone at the County has been notified of your intention to bring this change before the Board. We are, as always, happy to discuss areas of concern and to explore opportunities at improvement within the new process. However, the County does not agree with your representation of patterns under the old or new model. We think that for the parties to move forward collaboratively the best place to start is through dialogue to understand the root of the concern, and to explore ways in which we might agree to resolve those issues. Beyond that, since we were not aware this was an issue, you were looking to move before the Board until late last Friday, we must respectfully request additional time to review the 5 cases you reference in conjunction with the proposed changes. We believe it is important to all stakeholders to ensure that information provided to the Board is accurate and complete and believe a 2-week timeframe does not allow for comprehensive dialogue between the parties and a complete review of the issues you have raised. This is a significant change which we think requires a careful and prudent approach among the parties prior to bringing the matter before the Board.

Based upon the above, we would ask for a meeting with staff over the next few weeks to dialogue on this issue. Thereafter, the County would be happy to provide feedback and commentary specific to that discussion and provide that information on or before August 1, 2023. This would allow staff the opportunity to respond or meet with the County specific to that response during the month of

August when the Board is dark, and still have sufficient time to place it on the Board's agenda for September.

We look forward to having the opportunity to work with the staff collaboratively in addressing this area of concern.

Thank you,

Catherine Laveau  
Senior Deputy Executive Officer  
County Executive Office/Risk Management

800 S. Victoria Avenue  
Ventura, CA. 93009  
Direct Dial: (805) 662-6540  
Main Line: (805) 654-3197  
[Catherine.Laveau@ventura.org](mailto:Catherine.Laveau@ventura.org)



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**From:** Webb, Linda <[Linda.Webb@ventura.org](mailto:Linda.Webb@ventura.org)>  
**Sent:** Friday, June 9, 2023 4:19 PM  
**To:** Laveau, Catherine <[Catherine\\_Laveau@ventura.org](mailto:Catherine_Laveau@ventura.org)>  
**Cc:** Vencel, Josiah <[Josiah.Vencel@ventura.org](mailto:Josiah.Vencel@ventura.org)>; Herron, Amy <[Amy.Herron@ventura.org](mailto:Amy.Herron@ventura.org)>; Nemiroff, Lori <[Lori.Nemiroff@ventura.org](mailto:Lori.Nemiroff@ventura.org)>  
**Subject:** New Model Hearing Rules

Catherine,

VCERA's "new model" for processing disability applications was authorized by the Board, in part, to ensure more expedient determinations. Under the "old model," some cases would take years to go to hearing while the discovery phase remained open. Unfortunately, five of VCERA's oldest "new model" cases are experiencing the same delay as was present under the old disability model. Of the five, only one has completed a hearing; the remaining cases still do not have a hearing date calendared because the County continues its discovery. While each party has a right to discovery, the applicant is entitled to due process, which includes the right to timely evaluation of a disability retirement application. Also, the Board of Retirement has a duty to deliver benefits promptly, an obligation that has not been met for our disability applicants:

- Thin: directed to hearing on 9/13/2021; waited 17 months to hearing on 2/21/2023
- Bruton: directed to hearing on 12/13/2021; waiting 16+ months
- Muhilly: directed to hearing on 12/30/2021; waiting 16+ months



- Solace: directed to hearing on 5/2/2022; waiting 12+ months
- Myers: directed to hearing on 10/3/2022; waiting 7+ months

To help correct this pattern of delay, VCERA plans to present to the Board of Retirement on July 10 the enclosed “New Model Disability Retirement Hearing Rules” which sets deadlines for the hearing process and evidence production. The purpose of the Hearing Rules aligns with the purpose of the Disability Hearing Procedures (DHPs)—that applications be “expeditiously processed with a minimum lapse of time”—without the two documents conflicting. We welcome the County’s comments by Friday, June 30. If you have any questions about this matter, please let me know.

**Linda Webb**  
Retirement Administrator



**Ventura County Employees' Retirement Association**

1190 South Victoria Avenue, Suite 200  
Ventura, CA 93003

Direct: 805.339.4262 | Administration Fax: 805.339.2502  
Main Line: 805.339.4250 | Department Fax: 805.339.4269

[Email](#) | [Website](#)

July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 S. Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: AUTHORIZATION FOR CHIEF TECHNOLOGY OFFICER TO ATTEND THE GARTNER IT SYMPOSIUM CONFERENCE, OCTOBER 16 - 19, 2023 IN ORLANDO, FLORIDA**

Dear Board Members:

Staff requests authorization for Chief Technology Officer, Leah Oliver, to attend the Gartner IT Symposium Conference, October 16 to 19, 2023 in Orlando, Florida.

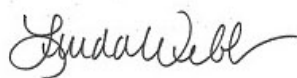
This year's conference focuses on cybersecurity and risk management, cloud infrastructure and operations, executive leadership and change management, strategic planning and execution, customer and citizen engagement, technology investments and value, and more. These topics and associated sessions are directly related to current and future planning for VCERA's business and technology needs. The preliminary conference agenda is attached for your reference.

The conference admission of \$5,375 per attendee, is included as part of the Gartner Executive Manager Program, therefore the only costs expected are \$3,500 for travel related accommodations. Funds for Ms. Oliver's attendance are included in the 2023-24 fiscal year's budget.

**RECOMMENDATION: AUTHORIZE CHIEF TECHNOLOGY OFFICER TO ATTEND 2023 GARTNER IT SYMPOSIUM CONFERENCE**

VCERA staff will be pleased to respond to any questions you may have on this matter at the July 10, 2023, Disability Meeting.

Sincerely,



Linda Webb  
Retirement Administrator



# Agenda

Hone your IT leadership skills, refine your strategies and discover the latest innovative technologies at the Gartner IT Symposium/Xpo™ 2023 conference in Orlando, FL.

## Agenda / Track

View By :



### – Future Directions

Monday, October 16, 2023 / 10:00 AM - 10:45 AM EDT

#### Gartner Opening Keynote: The Next Era – We Shape AI, AI Shapes Us

Don Scheibenreif, Distinguished VP Analyst, Gartner

Mary Mesaglio, Managing Vice President, Gartner

Generative AI has burst onto the scene, unleashing both possibilities and threats for CIOs everywhere and raising questions that range from the metaphysical (what does it mean to be human?) to the tactical (where and how should I use AI to create value and what are the risks?). The Gartner Opening Keynote will meet these questions head on to ensure CIOs stay out in front in this new era of human-machine relationships.

Monday, October 16, 2023 / 11:30 AM - 12:00 PM EDT

#### Shift Your Focus From Problems to Value and Transform Your Role as CIO

Irving Tyler, Distinguished VP Analyst, Gartner

Which do you think is most important: Being seen by the C-suite as a strong problem solver or being seen as a leader in value-creation efforts? The truth is that highly successful executives are not measured by what they do but by the value they deliver, and by what they accomplish. CIOs must shift their leadership approach to become outcome-driven. This session enables CIOs with the mindsets and practices they need to shift the value of the CIO Role.

Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

#### Top Security Trends for 2023

John Watts, VP Analyst, Gartner

“Top trends” highlight shifts in the security ecosystem that aren't widely recognized, but have potential for disruption. This session will describe the significant trends in risk management and how organizations are taking advantage. Key issues include technological improvements in the security capability landscape; trends in creating a high-performing security organization; and long-term trends that will influence security strategy.

Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

## Gartner Futures Lab: The Future of Leadership

Frank Buytendijk, Distinguished VP Analyst, Gartner

For executives, it is not enough anymore to be a strong functional leader. Many of the current challenges go across function and domain. What are the main challenges that executives will face the next 10 years and how will that affect their leadership?

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Monday, October 16, 2023 / 05:00 PM - 05:45 PM EDT

### Guest Keynote: Digital Innovation – Preparing Your Mindset for the Future

Jay Shetty, #1 New York Times Bestselling Author, Podcaster, Purpose Coach and Former Monk,

What got us here, won't get us there. How can companies redefine their mindset for the new world? What skills need to be prioritized, enhanced and focused on and what can we let go of? Jay Shetty believes the solutions for the future are sitting inside your company right now but often they're not being asked the right questions. This sessions unlocks the potential.

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Tuesday, October 17, 2023 / 09:00 AM - 09:45 AM EDT

### Guest Keynote

Details coming soon!

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

### CIOs Must Move Now on Machine Customers or Face a Decade of Regret

Don Scheibenreif, Distinguished VP Analyst, Gartner

Billions of machine customers are headed your way. But what tangible steps can CIOs take to get this moving in their organization? Don't be like the leaders of Kodak, Blockbuster, or Sears who failed to catch the next big wave. In this session, we'll share insights and actions from Gartner's new book, When Machines Become Customers, to help you meet this trillion-dollar opportunity.

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

### The Future of Cloud in 2028: From Technology to Business Necessity

Dennis Smith, Distinguished VP Analyst, Gartner

By 2028, having executed a successful cloud strategy will be a requirement for enterprise business success. This session will help IT leaders navigate the evolving cloud computing landscape, including the implications of multicloud, industry clouds and sovereign cloud deployments. Vendor dynamics, where they might collaborate and compete, will also be discussed.

---

Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

### A Strategic Roadmap for the Future of Applications

Patrick Connaughton, VP Analyst, Gartner

Recent surveys show that increasing alignment with business objectives is the top priority for enterprise application leaders. To do that, CIOs and application leaders must guide their organizations toward business transformation and next-generation application experiences. This presentation will highlight the key milestones on the strategic roadmap to the future of applications — AI, data and analytics and emerging technologies.

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Tuesday, October 17, 2023 / 12:30 PM - 01:00 PM EDT

## **Gartner Futures Lab: Brave New Worlds — A Tapestry of Trends 2024**

**Marty Resnick, VP Analyst, Gartner**

It's difficult for enterprise leaders to make choices without understanding the evolving landscape of transformational change. This Tapestry of trends story enables executive leaders to contribute to enterprise strategy and prepare the organization for brave new worlds. Find out how to factor in emerging macro and environmental trends that could impact your organization's business models and strategic planning.

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Tuesday, October 17, 2023 / 12:30 PM - 01:00 PM EDT

## **The Edge Computing Art of the Possible**

**Thomas Bittman, Distinguished VP Analyst, Gartner**

Enterprises are using edge computing today for digital transformation into stores, equipment, factories and remote locations. Edge computing drives automation, new customer experiences, cost reduction and new business opportunities. We will discuss a broad range of real use cases across vertical industries, discuss what enterprises learned and what they achieved.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## **Autonomous Business: CIOs Who Don't Lead the Next Big Wave Beyond Digital Could Be Sidelined**

**Mark Raskino, Distinguished VP Analyst, Gartner**

Autonomous business is the answer to the big question "what comes after digital?" AI, blockchain, and other technologies combine to fundamentally reshape business methods and models in the second quarter of the 21st century. CIOs must understand the core shifts of this new era, so that they can inform their CEOs and executive teams, and help reset strategy for the next wave of disruption that is headed toward us.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## **Banking Reimagined: Preparing for Next Generation Business Models**

**Benjamin Seesel, VP, Advisory, Gartner**

Evolving competitive dynamics are pressuring banks to adjust to ever-changing business models and new operating realities. At the same time, macroeconomic forces and the recent banking failures are pressuring firms to maintain profitability and generate sustainable growth. This session will explore the banking business model of the future and discuss how banks can reinvent their business models sustainably and cost-effectively.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## Insurance: The Digital Reset - Rethinking and Enhancing Digital for Success

Kimberly Harris-Ferrante, Distinguished VP Analyst, Gartner

Insurers have been on their digital journey for a long time but still lack maturity. Many new business pressures such as talent and financial constraints are pushing insurers to rethink their journey. This session will look at the key business drivers that are forcing industry transformation and the opportunities that CIOs must pursue to drive better business outcomes such as dynamic customer engagement, CX and emerging technology use such as metaverse, AI and hyperautomation.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## Higher Education: The Future in a World of You and AI

Robert Yanckello, Sr Director Analyst, Gartner

Higher education institutions must prepare a world where AI-fueled information growth consistently outstrips the capacity of individuals to learn. Join this session to explore implications for teaching, learning, knowledge development and institutional strategy.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## Government: Digital Government Is Over! Now What?

Dean Lachecha, VP Analyst, Gartner

Digital is no longer a qualifier for how government delivers services. It's distracting. Mission outcomes is all that counts. This session will explore how emerging technologies and practices set the stage for enabling what the future of government looks like and what CIOs need to stop, start and continue to achieve post digital government ambitions.

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Tuesday, October 17, 2023 / 02:45 PM - 03:15 PM EDT

## Oil & Gas: 3 Mega-Trends (plus Generative AI) Shaping the Future

Rich McAvey, Distinguished VP Analyst, Gartner

The universe of business and digital strategies across the industry continues to grow more diverse. At the same time, strategy is becoming clearer and more focused at the company level. Gartner has identified an essential set of mega-trends that are shaping the future of the industry.

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Tuesday, October 17, 2023 / 02:45 PM - 03:30 PM EDT

## Ask the Expert: Top Strategic Predictions for 2024 and Beyond: The Year Everything Changed

Daryl Plummer, Distinguished VP Analyst, Gartner

This interactive discussion serves as a follow up to the Signature Series session, Top Strategic Predictions for 2024 and Beyond: The Year Everything Changed, presented earlier in the agenda. Come prepared to ask questions, and learn from those posed by your peers, regarding the most provocative predictions revealed by Gartner this week at IT Symposium/Xpo.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Key Trends in Customer Experience You Can't Ignore

Don Scheibenreif, Distinguished VP Analyst, Gartner

Customer Experience evolves as customers evolve. But what key forces should you pay attention to, and how do you position the IT organization to help? In this session, we'll share our key cultural, behavioral, and technology trends that promise to make things interesting.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## The CIOs Contribution to Growth

Dave Aron, Distinguished VP Analyst, Gartner

The CIO needs a growth agenda to respond to CEO demands. High-growth enterprises leverage three catalysts for growth — strategic diversification, collective leadership and embedded antifragile practices. However, only 34% of senior executives believe CIOs take a leadership role in contributing to the company's growth. This session focuses on how and where CIOs can become growth leaders.

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Wednesday, October 18, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote

Details coming soon!

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## The Top Predictions for Cybersecurity 2023-2024

Every year, Gartner produces impactful predictions across all practices. This presentation will compile the top predictions prepared by our cybersecurity experts. Security and risk management leaders should monitor these trends to be successful in the digital era, especially as most recognize that global change could potentially be one crisis away.

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## Top Trends for Data and Analytics in 2023

Gareth Herschel, VP Analyst, Gartner

AI is not the only thing driving rapid change in D&A. There is a rapid evolution in how and where analysis can be deployed, from the next generation of augmented UXs and beyond; composing and operationalizing D&A at scale; engineering decision intelligence; and relating everything; to enabling D&A at the edge. Understanding the business impact of these changes will allow organizations to resource-optimize, accelerate change, drive innovation and transform society over the next three years.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## A Net Zero Roadmap for Sustainable IT

Kristin Moyer, Distinguished VP Analyst, Gartner



Most current sustainable IT programs represent a great start, but are barely scratching the surface of getting close to net zero. CIOs in enterprises with big sustainability ambitions will need to significantly up their game in order to achieve net zero in IT and likewise act in support of the wider enterprise. This presentation will guide you through upping your game to net zero.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Top Trends Impacting Infrastructure and Operations

Jeffrey Hewitt, VP Analyst, Gartner

I&O leaders have little time, skills and budget to track emerging trends, and the full impact of those on infrastructure and operations. I&O leaders should use this research to identify which of the top trends are most likely to impact their organization and implement effective tactics to respond. Trends to be covered relate to both infrastructure and operational issues.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Maverick Research: The (Far) Future According to Maverick

Frank Buytendijk, Distinguished VP Analyst, Gartner

Marty Resnick, VP Analyst, Gartner

A new presentation format and already an IT Symposium classic. Join us for this highly provocative session as we discuss our boldest predictions. You can't lose. Either gain a new perspective and change course, or discard it and move on with new conviction.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Seven Disruptions You Might Not See Coming: 2023-2028

Daryl Plummer, Distinguished VP Analyst, Gartner

Disruptions are fundamental shifts in something, which create lasting change that does not tend to die away unless disrupted by something else. CIOs must embrace the notion that disruption will continue and become more frequent. This will decide who leads and who follows. This presentation examines seven disruptions that are closer than you might think and should be on the CIO's strategic radar.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Should Digital Twins of a Customer Serve the Enterprise or the Customer

Stephen Smith, VP Analyst, Gartner

Much of the discussion of digital twin of a customer is centered around leveraging them as an enterprise to benefit the enterprise's ability to create products and experiences that the enterprise believes would be either competitively powerful or helpful to a customer. This presentation explores a different approach to bring more control value directly to the customer.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Higher Education: The Outlook Is Bright - A Voice From the Future to Inform Key Institutional Actions

Robert Yanckello, Sr Director Analyst, Gartner

Ongoing disruption has led to many challenges throughout the higher education sector but the impact of technology on learning, engagement and delivery has never been more optimistic. Higher education CIOs face a complex web of possibilities, technologies and practices. Join this session to explore Gartner's views of the industry in 2035, identify challenges to the sector for 2024 and to set priorities for near-term institutional actions.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Banking: Program or Get Programmed - Prepare Now for Programmable Money

Moutusi Sau, VP, Team Manager, Gartner

Advanced AI systems are increasingly defining the destination, route, speed and value proposition of your business. The choice is stark: Program or Get Programmed. The next frontier in this competitive battle is money itself. Programmable money enabled by technologies such as blockchain, tokenization and smart contracts can take many forms. In this session, we will explore the implications for bank CIOs and how they should prepare for this opportunity.

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Thursday, October 19, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote: Collaborating with AI: The Future of Creativity

Taryn Southern, Award-winning Artist, Storyteller and Strategist,

Pioneering content creator and AI artist Taryn Southern has worked at the intersection of technology and storytelling for more than a decade. Her collaborations with AI include composing chart-topping pop songs, bringing historical photos to life, producing her own digital video clone, even optimizing her health after a harrowing health diagnosis. In this session, Taryn shares how AI can be used to inspire creativity and personal transformation in your business - and life.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## Maverick Research: Consumer-Owned Bots Are Coming to Disrupt Your Profitability

Penny Gillespie, VP Analyst, Gartner

Executives beware: Consumer bots are on their way to fundamentally change how customers buy goods and services. Driving this veritable army of new bots is customer dissatisfaction with poor service delivered by chatbots, the accessibility of artificial intelligence devices, such as ChatGTP, and an announcement by the father of the internet, Tim Berners-Lee, that he was starting a company to make customer bots. Prepare now or be left behind.

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Thursday, October 19, 2023 / 02:45 PM - 03:15 PM EDT

## What CIOs Need to Know About Space: Earth Observation Opportunities and Threats

Bill Ray, VP Analyst, Gartner

Low-cost satellites are providing unprecedented views from orbit, while AI is counting the cars coming out of Chinese factories, the oil pumped out of the ground in America, and the nickel smelted around the world. Using real-world examples, this session explains how companies are already reacting to this new age of transparency, and how you should be doing the same.

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Thursday, October 19, 2023 / 03:30 PM - 04:00 PM EDT

## CIOs Must Prepare for Microinnovation Outside of IT to Increase Value and Reduce Risk

Tsuneo Fujiwara, VP Analyst, Gartner

Incremental technology innovation-microinnovation — outside of the IT department is on the rise. But most CIOs do not know how to effectively support or have sight of these initiatives. This session will look at the steps CIOs can take to support both the development and adoption of microinnovations across their organisations.

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Thursday, October 19, 2023 / 03:30 PM - 04:00 PM EDT

## Maverick Research: The Quantum Leap to Universal Services

Brett Sparks, Sr Director Analyst, Gartner

Exponential advances in the metaverse, AR, and quantum fields of study will eventually expose combinative capabilities previously unknown or only imagined. Providers of these quantum capabilities must plan for new levels of universal accountability, employee protection, and digital ethics.

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Thursday, October 19, 2023 / 03:30 PM - 04:00 PM EDT

## It's Time to Industrialize Your Digital Business Strategy

Stephen Smith, VP Analyst, Gartner

The blurring of the physical and the digital has created new businesses and generated significant value for many. However, many enterprises are disappointed with the financial results of their digital initiatives. This presentation will describe the shift from simply adding digital to your business to restructuring how you compete and operate by embedding digital in your most fundamental strategies.

### — Strategies for Success

Monday, October 16, 2023 / 10:00 AM - 10:45 AM EDT

## Gartner Opening Keynote: The Next Era – We Shape AI, AI Shapes Us

Don Scheibenreif, Distinguished VP Analyst, Gartner

Mary Mesaglio, Managing Vice President, Gartner

Generative AI has burst onto the scene, unleashing both possibilities and threats for CIOs everywhere and raising questions that range from the metaphysical (what does it mean to be human?) to the tactical (where and how should I use AI to create value and what are the risks?). The Gartner Opening Keynote will meet these questions head on to ensure CIOs stay out in front in this new era of human-machine relationships.

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Monday, October 16, 2023 / 11:30 AM - 12:00 PM EDT

## The Art of Digital Transformation: How to Pilot Your Operating Model to Succeed

Donna Scott, Distinguished VP Analyst, Gartner

Gartner's value-optimized IT operating model enables digital transformation — a goal that has so far been elusive for most enterprises. To succeed, mindsets must be overhauled. Business leaders must be IT-savvy, comfortable making IT decisions and working in distributed fusion teams to both innovate and execute. CIOs can propel digital transformation by partnering with a business sponsor to design and execute a successful pilot that compels senior leaders to act.

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Monday, October 16, 2023 / 11:30 AM - 12:00 PM EDT

## CIO Playbook: 4 Powerful Steps to Combat Inflation During Vendor Negotiations

Jo Ann Rosenberger, Distinguished VP, Advisory, Gartner

Inflationary times create added complexity when negotiating with vendors. Proactively planning critical vendor renewals is key to negotiating fair pricing on both renewals and new deals. This session will use two vendor proposal case study scenarios to demonstrate a powerful 4-step approach to proactively plan for negotiations. The 4-step approach will guide CIOs on how to "vendorize" a playbook using simple should-cost models for negotiating win-win deals for both the vendor and client.

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Monday, October 16, 2023 / 11:30 AM - 12:00 PM EDT

## Executive Leadership 2.0 — How to Thrive in a World of Permanent Volatility

Tina Nunno, Distinguished VP Analyst, Gartner

Executive leadership teams are generally optimized for three approaches: individual functional excellence, more stability than volatility and taking decisions based on experience and authority. However, recent exogenous shocks overturn each of these assumptions. Where and how do executive teams need to change to thrive in this new world order? This session delves into tactics and strategies for CIOs to lead not just as functional heads but as executive leaders in this new world.

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Monday, October 16, 2023 / 12:30 PM - 01:00 PM EDT

## How Generative AI Will Radically Change Application Development

Van Baker, VP Analyst, Gartner

Generative AI has the potential to change applications from user interface based transactional platforms to interactive experiences for application users. Applications will improve and expand on user input to the application and suggest additional content or actions for the user to do. Software engineering leaders need to acquire skills to embed generative AI capabilities into applications they are building for their enterprises.

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Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

## The One Thing Leaders Must Know About Leading Change

Shawn Murphy, Sr Director Analyst, Gartner

The pace of change will never be this slow again. For CIOs and leaders across the enterprise, the pace of change is as much of a change leadership challenge as it is a technical one. As every change requires the involvement of people, ineffective change leadership generates confusion and can damage morale. In this session, CIOs will learn the key to engaging all stakeholders for successful change.

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Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

## How CIOs Can Meet the Evolving Needs of the Board of Directors

Tina Nunno, Distinguished VP Analyst, Gartner

The pandemic, geopolitical shifts and changing economic dynamics have created material changes in the boards of directors (aka, supervisory boards) priorities and composition. This session will share how CIOs can engage with their boards and demonstrate the strategic relevance of technology leadership regarding the issues that boards and their enterprises will care about the most in 2024.

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Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

## Embrace Fusion Teams to Drive Business and IT Success

Brandon Germer, Sr Director Analyst, Gartner

Two out of three CEOs and three out of four business executives want to see more IT done in the business units. CIOs themselves report that IT spending outside of IT is approaching 30% of all IT spending. Based on a primary research study, this presentation will outline how CIOs should respond to this trend to maximize both business and IT success.

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Monday, October 16, 2023 / 05:00 PM - 05:45 PM EDT

## Guest Keynote: Digital Innovation – Preparing Your Mindset for the Future

Jay Shetty, #1 New York Times Bestselling Author, Podcaster, Purpose Coach and Former Monk,

What got us here, won't get us there. How can companies redefine their mindset for the new world? What skills need to be prioritized, enhanced and focused on and what can we let go of? Jay Shetty believes the solutions for the future are sitting inside your company right now but often they're not being asked the right questions. This sessions unlocks the potential.

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Tuesday, October 17, 2023 / 08:00 AM - 08:30 AM EDT

## Executive Insights

More details to come!

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Tuesday, October 17, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote

Details coming soon!

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

## Midsize Enterprise CIO Leadership Vision

Joseph Provenza, VP Analyst, Gartner

In a world that continues to face uncertainty and disruption, the job of the CIO in a midsize enterprise becomes even more challenging. Join us for a data-driven look at the current trends and challenges facing the CIO. We will address these trends and challenges with actionable strategies and tactics to help drive success for the CIO and the organizations they serve.

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

## Executive Vision for 2024: Strategic Portfolio Management

Anthony Henderson, VP Analyst, Gartner

Accelerating your transformation and digital initiatives is paramount to sustaining competitiveness and/or remain relevant. This session will equip executives with essential strategic portfolio management approaches and practices to deploy over the next 12-18 months to establish enterprise resilience amid certain disruptions and position the organization to change the dynamics of your industry.

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

## Leadership Vision for Security and Risk Management, 2023

CISOs are key enablers of digital business and are accountable for helping the enterprise balance the associated risks and benefits. This leadership vision will help CIOs and CISOs plan for 2023 and 2024, and in presentations to leadership, peers and teams.

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Tuesday, October 17, 2023 / 10:30 AM - 11:00 AM EDT

## Rethinking the Technology Workforce: Solving for Adaptability, Not Retention

Miles Gibson, VP, Research, Gartner

The focus on hiring and retaining highly-skilled technology specialists has been insufficient to address IT's perennial talent challenges. This session will showcase examples from leading CIOs that will help you redesign IT roles and workflows and leverage automation to adapt when your talent is in constant flux.

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Tuesday, October 17, 2023 / 10:30 AM - 11:15 AM EDT

## Ask the Expert: CIO and Technology Executive Agenda for 2024

Mandi Bishop, VP Analyst, Gartner

This interactive discussion serves as a follow up to the Signature Series session, CIO and Technology Executive Agenda for 2024, presented earlier in the agenda. Come prepared to ask questions, and learn from those posed by your peers, regarding the findings from Gartner's CIO and Technology Executive survey as revealed this week at IT Symposium/Xpo.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Tuesday, October 17, 2023 / 12:30 PM - 01:00 PM EDT

## Wall Street Journal Interview Panel

Chris Howard, Distinguished VP Analyst, Gartner

Join us for a fascinating inside look at how veteran IT leaders take advantage of the massive shifts that define markets to drive outcomes and deliver value.

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Tuesday, October 17, 2023 / 12:30 PM - 01:00 PM EDT

## Supercharge Your Digital Employee Experience With Superapps

Jason Wong, Distinguished VP Analyst, Gartner

Superapps is one of Gartner's top strategic technology trends in 2023 because its reach is becoming global, and its impact is not just on consumers but also on workforces. Learn why superapps will become an essential part of the digital employee experience, what are the technologies behind them and how CIOs can create a successful superapp strategy.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Digital Products Will Transform Your Enterprise ... and IT

Hung LeHong, Distinguished VP Analyst, Gartner

CIOs have been steadily increasing their digital product know-how, starting with employee-facing digital products and customer-facing channels/portals. It's now time to go further. Revenue-generating and venture-building digital products are forcing a convergence in all parts of the organization. This is not a solo IT journey. Learn how this product journey will transform the whole enterprise and IT, and be prepared to chart your course.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Government: Be a Rockstar by Tackling the 3 Common Challenges to Legacy Modernization

Legacy modernization efforts have accelerated substantially within government agencies. During this session we'll explore the key trends, drivers and considerations for legacy modernization and how to position organizations for successful digital execution into the future.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Maximizing Returns from Digital: An Empirical Analysis of Successful CxO-CIO Partnerships

Jaime Capella, Distinguished VP, Research, Gartner

CxOs want to lead digital business initiatives but struggle with the multidisciplinary execution and cross-cutting partnerships required to succeed. Hence, most enterprises report disappointing returns from digital investments. This session features real-world case studies and key insights from our unique, global surveys of CxOs, P&L Leaders and CIOs, to provide fact-based guidance on how to forge productive CxO-CIO partnerships that maximize returns from digital investments.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## What Good Looks Like — Stories of CIO Allyship

Tori Paulman, Sr Director Analyst, Gartner

Stories of allyship range from the uncomfortable, the embarrassing, the learning moment, and sometimes even success. CIOs have an outsized opportunity to contribute to improved DEI (diversity, equity, and inclusion) by acting as an ally to people in marginalized or

underrepresented groups. This session will help you become an allyship champion by highlighting the stories of your peers on their journey.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Mastering the Art of Persuasive Leadership for CIOs

Jose Ramirez, Sr Principal Analyst, Gartner

What makes a great CIO? Beyond technical experience and knowledge of the business, CIOs must be persuasive. This session explores three stories that every CIO should master to be a more persuasive leader.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## Think You're Safe? Results From the Gartner Cybersecurity Business Value Benchmark

Paul Proctor, Distinguished VP Analyst, Gartner

The top cybersecurity ask from boards is for peer comparison data. The metrics establish a baseline for peer comparison that is useful for guiding cybersecurity investments. Gartner is benchmarking protection-level outcomes that create a foundation for effective collaboration with boards of directors, CIOs and CFOs. See early insights from the first-generation benchmark and get a preview of the second generation.

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Wednesday, October 18, 2023 / 08:00 AM - 08:30 AM EDT

## Executive Insights

More details to come!

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Wednesday, October 18, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote

Details coming soon!

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## Oil & Gas: Can Operations be Excellent Without Generative AI and Intelligent Assets?

Rich McAvey, Distinguished VP Analyst, Gartner

Business performance depends upon a fleet of long-lived physical assets. This session demonstrates why intelligent assets are essential for maintaining operational excellence despite turbulent markets.

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## CIO Panel: Overcoming Diversity Challenges — Getting to CIO and Beyond

Gene Alvarez, Distinguished VP Analyst, Gartner



Diversity challenges come in many forms. Issues of race, color, creed, sex, and sexual orientation are at the forefront of organizations. However, CIOs can face many other diversity challenges such as building a diverse culture and teams and diverse skill sets. How to prioritize and act on all these challenges? This panel of CIOs will provide their views on these challenges and much more.

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## Outlook for Cloud Security 2023

Richard Bartley, VP Analyst, Gartner

Cloud security remains a top priority. This session summarizes the problems, processes, and emerging and evolving product types to address three key issues:  
What are the unique risks associated with public cloud service providers, and how can they be controlled?  
What are the unique security challenges of IaaS and PaaS and how can they be mitigated?  
What are the unique control challenges of SaaS and how can they be addressed?

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## Retail: The Omniscient Store — Strengthen Your Top Revenue Generator to Increase Profitability

Sandeep Unni, Sr Director Analyst, Gartner

The increasingly digitalized store is becoming "omniscient" — with the ability to weave physical and digital interactions to drive highly engaging and immersive experiences in the store. This will lead to higher customer engagement, conversion, and increased profitability. It will also fundamentally recast the store employee experience and offer a competitively differentiated digital workplace to attract frontline talent.

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

## Government: Get AI Right, or Fail, in a Post Digital Era

Dean Lacheca, VP Analyst, Gartner

Governments must mature their approach to AI. Getting assurance, ethics and engineering of AI right is essential to any CIOs success with AI, but in government failure can have catastrophic impacts on society. This session will provide the key actions that government CIOs must take to get AI right.

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Wednesday, October 18, 2023 / 12:30 PM - 01:00 PM EDT

## Applying the Fundamentals of Customer Experience

Michael Chiu, VP Analyst, Gartner

This session will cover the fundamentals of customer experience, including CX CORE model, what customer experience is and how to measure it, getting your organization started on it, understanding your customers, and other topics. It will explain some of the key customer experience tools like personas and customer journey maps, and will illustrate "what good looks like" for them and others.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## How the Most Successful CIOs Use Their Time

Matt Hancocks, Sr Director Analyst, Gartner

Drawing on results from multiple Gartner CIO and other CxO surveys, as well as external data, in this session we will discuss the differences in how the most successful CIOs use their time.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Recipes for AI Maturity Learned From Known Successes and Mistakes

Svetlana Sicular, VP Analyst, Gartner

How can organizations increase their AI maturity level, find the next best actions and avoid common mistakes? Use Gartner AI maturity model and insights to accelerate and optimize your AI strategy and implementations, reduce risk, and get to scalability quicker in AI programs. Learn how advancing AI maturity is beneficial for the AI teams and for the business.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Leadership Lessons From the Careers of Women and Gender Nonconforming CIOs

LJ Justice, Sr Principal, Research, Gartner

While many CIOs make a commitment to DEI and focus on diversifying the technology workforce, they frequently struggle to pass the baton to candidates from underrepresented groups. Our unique data set from over 50 female and gender non-conforming (GNC) CIOs offers insight into their career journeys to help CIOs with creating a succession plan that aligns with their commitment to DEI.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## How to Value Artificial Intelligence for Your Organization

Erick Brethenoux, Distinguished VP Analyst, Gartner

AI is imperative but it's also challenging to assign a value to it. Resource costs it consumes are unique and return on employing it demands new ways of calculating what it can offer to a business. Learn how to marry traditional calculations of ROI with the need to grow AI mastery in your organization.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## Banking: Lessons From Innovation Heavyweights - Methods to Drive Business Adoption For New Products

Technologies impacting banking are moving at a blistering pace, from generative AI to web3. But the majority of innovation projects are not ultimately adopted by business stakeholders. This session provides the most compelling examples of innovation in banking that boost revenue growth and help customers and communities, and guidance on controllable levers for the CIO to boost the adoption of innovative new products by business partners.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## Insurance: The Pathway From Automation to the Autonomous Insurer

Richard Natale, Sr Director Analyst, Gartner

The rate of automation in insurance is high already. Focusing solely on efficiency will not meet the business objectives the industry needs in the future. Insurers need to focus on enabling autonomous processing in order to compete. This presentation will present a roadmap to becoming an autonomous insurer by leveraging advanced analytics, event technology, IoT and process-centric design for complex business processes.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## **CIOs: Nurture Your Influence by Increasing High Performance in the C-Suite**

Kevin Smith, Sr Director Analyst, Gartner

Only 5% of C-suites worldwide share a common vision about the digital transformation they need to undertake in their enterprises. This is far from being a scenario that drives high performance in a world where business transformations are relentlessly underpinned by "digital." CIOs have the opportunity and the responsibility to become the influential catalyst who guides the C-suite toward "digital high performance."

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## **Higher Education: How to Use Analytics to Show the Business Value of IT**

Marlena Brown, Sr Director Analyst, Gartner

This session discusses how to leverage analytics to implement and measure your higher education IT strategy and ensure delivery against mission-critical business priorities.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## **Government: Superapps - the Key to Orchestrated Ecosystems**

Bill Finnerty, VP, Team Manager, Gartner

In a post digital era, governments will operate in an ecosystem orchestrated around citizens' needs, powered by a superapp architecture. To be successful, CIOs must prepare their organization to both build superapp frameworks and develop minapps available for orchestration as part of superapps.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## **Leadership Vision for the Midsize Enterprise Technology Leader**

Mike Cisek, VP Analyst, Gartner

Albert Gauthier, Director Analyst, Gartner

Midsize enterprise technology leaders must develop a holistic forward-looking vision that is secure, cost-effective, and resilient yet adaptive to business demands. In this session, we identify the trends and challenges impacting midsize enterprises and the actions to optimize operations and maximize their capacity for growth and transformation.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## **Insurance: Four Strategies for CIOs to Drive Customer Value and Satisfaction**

Kimberly Harris-Ferrante, Distinguished VP Analyst, Gartner

While CIOs rate customer experience as one of the top business priorities and goals of digital investments, strategies are not aligned with customer needs. The bar is rising quickly, and it is imperative that insurers adopt best practices in driving customer engagement to promote more customer value, secure relationships and prevent churn, and drive revenue growth. Rolling out new strategies such as dynamic engagement, panoptic personalization, behavioral modeling and prevention services are needed to fulfill this. This presentation will showcase Gartner data on what consumers want from insurers, providing recommendations on how to build channel and digital strategies to optimize client engagement.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Make Talent a Key Enabler of a Product-Centric Organization

Lily Mok, VP, Team Manager, Gartner

Talent is a key enabler of IT operating model success. CIOs on the journey of transitioning to a product-centric organization must shift their leadership mindset and prepare the workforce with the capabilities needed to succeed in the new model. This session provides CIOs with strategies and approaches to mastering culture & people dynamics in transforming into a product-centric organization.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Government: Leading Toward the Post Digital Era

Bill Finnerty, VP, Team Manager, Gartner

The post digital era brings three focuses for government; being empathetic, being insight-driven and leveraging an orchestrated ecosystem. However, these elements of post-digital will manifest themselves differently across the various government segments. This session will explore examples of government organizations that are leading the way toward the post digital era.

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Thursday, October 19, 2023 / 08:00 AM - 08:30 AM EDT

## Executive Insights

More details to come!

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Thursday, October 19, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote: Collaborating with AI: The Future of Creativity

Taryn Southern, Award-winning Artist, Storyteller and Strategist,

Pioneering content creator and AI artist Taryn Southern has worked at the intersection of technology and storytelling for more than a decade. Her collaborations with AI include composing chart-topping pop songs, bringing historical photos to life, producing her own digital video clone, even optimizing her health after a harrowing health diagnosis. In this session, Taryn shares how AI can be used to inspire creativity and personal transformation in your business - and life.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## CIO's Guide to Navigating Quantum Computing to Business Outcomes

Matthew Brisse, VP Analyst, Gartner

Quantum computing has the potential to revolutionize your business and your industry. It also has the potential for post-quantum cryptographic threats and vulnerabilities. This session will introduce both opportunistic and defensive approaches to quantum computing. You will walk away with a solid understanding of quantum computing is something you should act on now, later, or never.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Leverage Gartner's Enterprise Operating Model to Optimize Business Operations

Janelle Hill, Distinguished VP Analyst, Gartner

Given economic headwinds, many CIOs are tasked to optimizing business operations to drive growth and improve cost effectiveness. CIOs can use Gartner's enterprise operating model to help executive leaders understand critical people, process, technology and other resource interdependencies that, if not resolved, will impede realization of desired business outcomes

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## 5 Ways CIOs Can Offset IT Labor Talent Shortfalls and Challenges

Brett Sparks, Sr Director Analyst, Gartner

Talent wants it all — higher salaries, less work and more freedom. And the talent you already have will be leaving if changes are not made in how work is done. As frustrating as all this can be, these are unconventional times requiring unconventional measures from CIOs. With the 2022 talent crunch and recent tech layoffs, what is the state of the IT labor market? And where in the world can you find the skills you need?

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Sharpen CIO Influence in the Boardroom With Risk, Value and Cost

Paul Proctor, Distinguished VP Analyst, Gartner

Technology investments in a business context create better business outcomes. Balancing risk, value and cost is central to all business decision making and a powerful lens to drive IT priorities and investments. Gartner's RVC model and outcome-driven metrics help the modern CIO link technology investments back to business outcomes.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Forget About Monitoring Employees! Use Workstyle Analytics to Improve Employee Experience

Lane Severson, Sr Director Analyst, Gartner

Productivity paranoia is rising. Workers are logging more hours with flexible working, but leaders still feel they are losing productivity. Workstyle analytics is a data-driven method to identify digital friction impacting worker performance and organizational productivity while protecting employee privacy. This session will share the tools and competencies you need to get started.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Counter Economic Headwinds and Close the Strategy-Execution Gap With Business Architecture

Philip Allega, VP Analyst, Gartner

With a turbulent economy, CEOs and boards of directors want to see the business benefits of digital investments. To counter economic headwinds, CIOs must turn to business architecture to close the strategy-to-execution gap. Here we will address: the role of business architecture, why it is essential and how to use business architecture to make smarter I&T investment decisions.

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Thursday, October 19, 2023 / 12:45 PM - 01:15 PM EDT

## Leverage Just Enough IT Governance for Execution Success

Joanne Kopcho, VP Analyst, Gartner

Managing the complexity across multiple product and platform workstreams requires focused and rapid decision making. CIOs must create “just enough” IT governance to cut through the complexity. This session will provide insights on creating the right level of IT governance that balances priorities across demand, capacity and value for execution success.

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Thursday, October 19, 2023 / 12:45 PM - 01:15 PM EDT

## The Evolving Digital Foundation

David Smith, Distinguished VP Analyst, Gartner

Digital foundations are a set of processes, principles and technical capabilities needed to enable future strategic business goals by delivering an adaptive and composable platform that supports the rapid delivery of new digital products and solutions. Without a flexible digital foundation that is scalable and adaptable, companies will not be able to adapt rapidly to changing business needs.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## From Burnout to Breakthrough: How the Power of Play Can Unlock Success for CIOs and IT Teams

Jennifer Carter, Principal Analyst, Gartner

CIOs are continuing to face serious employee well-being issues with burnout, stress, fatigue, and isolation all still on the rise in the hybrid workplace. A focus purely on finding purpose in work for most employees isn't enough. Instead, CIOs should identify ways employees can derive meaning from a sense of play at work. This session will show CIOs how to do the same.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## 5 Ways CIOs Must Support Cybersecurity Talent Cultivation

Alex Michaels, Principal Analyst, Gartner

Workforce retention and talent hiring is the second top strategic initiative for the board of directors. As finding and retaining the right cybersecurity talent is currently at the forefront for CIOs and their peers, it is imperative they learn the proven progressive tactics to improve their partnership with security, HR and other business leaders.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## Why Industry Cloud Platforms Demand a Rethink of Your Enterprise Cloud and Provider Strategies

Gregor Petri, VP Analyst, Gartner

Enterprises are rethinking their cloud strategies as the expected outcomes of their current cloud adoption are not meeting expectations. Industry cloud platforms are bridging the gap between technology investments and business outcomes. Learn how to leverage composable industry cloud platforms, a Gartner 2023 Top Strategic Technology Trend, to create value for your customers.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## How to Enable API Governance Across Multiple API Management Solutions, Initiatives and Development Teams

Paul Dumas, Sr Director Analyst, Gartner

Establishing governance policies for APIs is only the first step. Enabling those policies to affect API development and execution is how organizations will realize the objectives and benefits of governance. In this session, learn how to incorporate governance into API development and execution.

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Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## Enterprise Technology Spend: Are You Tracking It and What to Do If You're Not

Jim McGittigan, VP Analyst, Gartner

Explore the need to better understand enterprisewide technology spend (both digital and IT spend regardless of the budget owner). Assess and define what technology spend you should be tracking at an enterprise level and why. The key is to track the right enterprise technology spend and make the best investment decisions possible.

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Thursday, October 19, 2023 / 02:45 PM - 03:15 PM EDT

## Build the Habits of Top Technology Leaders With High Business Impact

Rita Sallam, Distinguished VP Analyst, Gartner

What are the habits of top technology leaders in organizations with consistent top financial performance over time? Gartner has analyzed the financial performance of Global S&P organizations versus their industries from 2014 to 2021 and identified common profiles of top and bottom performers. This session will show CIOs and technology leaders how to assess their business value competency maturity and leverage best practices of top performers to have maximum impact on the business performance and value of the organization.

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Thursday, October 19, 2023 / 02:45 PM - 03:15 PM EDT

## Strategic Roadmap for Enterprise Greenhouse Gas Management Data and Analytics

Chet Geschickter, VP Analyst, Gartner

Regulators are pushing enterprises to publish their CO2 emissions and many organizations have pledged to reach Net Zero emissions or to substantially reduce their greenhouse gas emissions. It's time for CIOs to step up and take a leadership role in designing and delivering the data and analytics capabilities to measure, model, and improve enterprise performance in achieving climate goals.

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Thursday, October 19, 2023 / 02:45 PM - 03:15 PM EDT

## Your Product Team Needs an Accessibility Function: Here Are 3 Steps to Get You There

Brent Stewart, Sr Director Analyst, Gartner

Digital accessibility is no longer a choice; it's imperative. The majority of digital product teams already have the skills needed to do accessibility well. They simply need the right tools, training and process updates to achieve WCAG compliance. This presentation will instruct the audience on how to stand up an accessibility function in their existing product team.

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Thursday, October 19, 2023 / 03:30 PM - 04:00 PM EDT

## Failure Is an Option: How to Make Principled Risk-Taking a Part of Your Culture of Growth and Innovation

Brook Selassie, VP Analyst, Gartner

Gartner data shows that one-third of growth strategy failures come from too little risk taking. Worse, over time this approach can become ingrained into the culture of the enterprise and serve as a cloud layer over the growth potential of the business.

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Thursday, October 19, 2023 / 03:30 PM - 04:00 PM EDT

## Optimize Your Change Capacity to Increase Business Outcomes

Anthony Henderson, VP Analyst, Gartner

Speed to value is the mantra, and organizations must change to survive, which requires increasing investment in the context of uncertainty and disruption. To realize the intended outcomes of their digital and transformation initiatives, organizations make resource trade-offs, including change capacity, as they rapidly sense conditions, construct informed strategies and prioritize investments.

### — Critical Execution

Monday, October 16, 2023 / 10:00 AM - 10:45 AM EDT

## Gartner Opening Keynote: The Next Era – We Shape AI, AI Shapes Us

Don Scheibenreif, Distinguished VP Analyst, Gartner

Mary Mesaglio, Managing Vice President, Gartner

Generative AI has burst onto the scene, unleashing both possibilities and threats for CIOs everywhere and raising questions that range from the metaphysical (what does it mean to be human?) to the tactical (where and how should I use AI to create value and what are the risks?). The Gartner Opening Keynote will meet these questions head on to ensure CIOs stay out in front in this new era of human-machine relationships.

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Monday, October 16, 2023 / 11:30 AM - 12:00 PM EDT

## What Workers Want — Top Findings From the 2022 Digital Worker Experience Survey

Tori Paulman, Sr Director Analyst, Gartner

This session provides insights from the digital worker survey about digital workers' sentiments and behavior toward the technology that they employ. In addition, this session will provide insights into digital workers' preferences on places to work, applications and devices to use, collaboration methods (meetings), and work culture.

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Monday, October 16, 2023 / 11:30 AM - 12:15 PM EDT

## Ask the Expert: The CIOs Role in Mergers, Acquisitions and Divestitures

Janelle Hill, Distinguished VP Analyst, Gartner

CIOs play a key role in mergers, acquisitions and divestitures, integrating (or disintegrating) operational processes, assets, systems and technologies. Beyond integration, CIOs can also support the deal in earlier stages of the M&A process. Some common questions are: What skill set will CIOs and their staff need at different points of the M&A process?; How can a CIO be an effective exec sponsor for a techquisition? Get answers to your questions in this group session.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Monday, October 16, 2023 / 11:30 AM - 12:30 PM EDT

## Contract Negotiation Clinic: AWS, Azure and Google

Dolores Ianni, VP, Advisory, Gartner

Cloud infrastructure and platform services contract negotiation involve substantial opportunities and risks. While the negotiation fundamentals are similar, each cloud vendor has specific commercials that clients need to fully understand. In this interactive clinic, we will review the critical steps for negotiations, vendor differences and similarities to be aware of when negotiating to achieve the most optimal contract.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Monday, October 16, 2023 / 12:30 PM - 01:00 PM EDT

## Ransomware Is Changing ... Are You Ready?

Paul Furtado, VP Analyst, Gartner

Ransomware attacks have been morphing. Techniques used by the bad actors are changing. During this presentation, we will provide insight into the new tactics being used by the bad actors not only to access your environment but what they are doing with your data once exfiltrated.

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Monday, October 16, 2023 / 12:30 PM - 01:00 PM EDT

## Architecting Your Customer Technology Platform

Gene Alvarez, Distinguished VP Analyst, Gartner

What is a customer technology platform? What customer problems does it address and help to solve? Why do you need to use enterprise architectural approaches to create one?

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Monday, October 16, 2023 / 12:30 PM - 01:00 PM EDT

## 20 Culture Hacks to Improve Hybrid Workplace Adoption and Efficiency

Lane Severson, Sr Director Analyst, Gartner

2020 hit the world with an opportunity to pivot the organizational culture in support of hybrid working today. Little changes can add up to big benefits. CIOs can use these hacks to nudge, guide and ultimately transform how your hybrid organization works. This rapid-fire session will reveal the top 20 culture hacks that drive adoption and efficiency.

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Monday, October 16, 2023 / 02:45 PM - 03:15 PM EDT

## The Foundation of a Modern Data and Analytics Strategy

Rita Sallam, Distinguished VP Analyst, Gartner

Meet the updated and improved "D&A Strategy and Operating Model" (DASOM). It is tried and tested, and now includes the most recent insights from thousands of client interactions, such as what a modern D&A strategy looks like, and how you can make sure the strategy leads to tangible and measurable business outcomes.

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Monday, October 16, 2023 / 02:45 PM - 03:45 PM EDT

## Contract Negotiation Clinic: SAP

Mike Tucciarone, Sr Director Analyst, Gartner

As SAP continues to shift its business to the cloud, the complexity of negotiating with SAP only continues to increase. SAP customers have many strategic options, licensing models and risks to consider. This interactive clinic will provide you with indispensable insight to enable smarter decisions and stronger performance on your organization's upcoming SAP negotiations.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Monday, October 16, 2023 / 05:00 PM - 05:45 PM EDT

## Guest Keynote: Digital Innovation – Preparing Your Mindset for the Future

Jay Shetty, #1 New York Times Bestselling Author, Podcaster, Purpose Coach and Former Monk,

What got us here, won't get us there. How can companies redefine their mindset for the new world? What skills need to be prioritized, enhanced and focused on and what can we let go of? Jay Shetty believes the solutions for the future are sitting inside your company right now but often they're not being asked the right questions. This sessions unlocks the potential.

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Tuesday, October 17, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote

Details coming soon!

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Tuesday, October 17, 2023 / 10:30 AM - 11:30 AM EDT

## Contract Negotiation Clinic: Oracle

Allison Adams, Director Analyst, Gartner

Oracle projects its cloud will drive twice the current revenue per customer placing increasing pressure on its customers to negotiate effective agreements. Oracle customers have many strategic options and risks to evaluate for both on-premises and cloud deployments. This interactive clinic will provide you with indispensable insight to enable smarter decisions and stronger performance on your organization's Oracle negotiations.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Tuesday, October 17, 2023 / 02:45 PM - 03:45 PM EDT

## Contract Negotiation Clinic: Gartner's Top 10 Tips, Tactics and Tricks to Enhance Your Negotiation Playbook

Jo Ann Rosenberger, Distinguished VP, Advisory, Gartner

This clinic is an interactive session that will walk through how to use 10 powerful negotiation tips, tactics, and tricks (the "TTTs") as an integral part of the negotiation planning process. These 10 TTTs can serve as your negotiation playbook for all major technology negotiations for cost optimization and risk mitigation. Attendees will receive ready-to-use templates and checklists to put these 10 TTTs in action in their organizations.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Tuesday, October 17, 2023 / 02:45 PM - 03:45 PM EDT

## Contract Negotiation Clinic: ServiceNow

Christopher Dixon, Sr Principal Analyst, Gartner

This session will cover what IT leaders need to know when entering contract negotiations with ServiceNow: understand the vendor's strategy, prepare for its negotiation tactics, and how to develop a negotiation strategy.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Tuesday, October 17, 2023 / 04:45 PM - 05:15 PM EDT

## The Cloud Journey: From Strategy to Transformation

David Smith, Distinguished VP Analyst, Gartner

Not all cloud journeys are the same but there are similarities. A business-driven strategy coupled with a pragmatic adoption/migration plan are critical. But knowing where you are and where you are headed is critical to success. Journeys range from infrastructure replacement to digital transformation with many others in between.

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Wednesday, October 18, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote

Details coming soon!

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

### How Composable Architecture Helps Leaders Master the Pace of Business Change

Yefim Natis, Distinguished VP Analyst, Gartner

Composability promises the business modern agility, resilience, adaptability and growth. A composable mindset can help CIOs target their investments to accelerate innovation and build confidence in businesses facing future disruptions. In this presentation, learn the business drivers, the best practices, the early steps forward and the key milestones on the roadmap to the agility of the leading digital business.

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Wednesday, October 18, 2023 / 10:30 AM - 11:00 AM EDT

### AI Engineering the Secret to Delivering AI at Scale

Chirag Dekate, VP Analyst, Gartner

Evolving from AI pilots/POCs to production is challenging. Gartner has identified three design patterns proven to work in early AI pioneers, providing reference templates for organizations seeking to accelerate the deployment of AI products.

---

Wednesday, October 18, 2023 / 10:30 AM - 11:30 AM EDT

### Contract Negotiation Clinic: Negotiating Traditional and Cloud Infrastructure Contracts

Tobi Bet, Sr Director Analyst, Gartner

This presentation highlights the differences as well as best practices for negotiations today in cloud-based contracting as compared to traditional IT contracts.

Please Note: Based on availability and eligibility you may sign-up for the session via Conference Navigator after you register for this conference.

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Wednesday, October 18, 2023 / 12:30 PM - 01:00 PM EDT

### How to Kickstart Platform Engineering in Your Organization

Bill Blosen, Sr Director Analyst, Gartner

Product teams often use a disjointed collection of tools and struggle to navigate increasingly complex architectural choices and security requirements. Software engineering leaders must kickstart platform engineering to improve the developer experience and accelerate value delivery. We will describe this Gartner key strategic technology trend and give pragmatic steps to implement it in your organization.

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Wednesday, October 18, 2023 / 12:30 PM - 01:00 PM EDT

### Demystifying Zero Trust

John Watts, VP Analyst, Gartner

Zero trust is a popular buzzword in the cybersecurity industry, but this is a confusing and misleading term. This presentation demystifies the concept and makes it relatable for everyone. Attendees will understand the origin of zero trust, get answers to some frequently asked questions by Gartner clients and understand how zero trust benefits them.

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Wednesday, October 18, 2023 / 12:30 PM - 01:00 PM EDT

## The End of Legacy IT

Howard Dodd, Sr Director Analyst, Gartner

Hung LeHong, Distinguished VP Analyst, Gartner

We've all heard that generative AI can re-code legacy languages into modern code. If so, should CIOs be planning for "The Great Re-Code" that will convert all technical debt into modern IT assets? Legacy IT is far more than just old, unsupported code. Generative AI and other technologies will have to provide many more pathways before CIOs can consider the end of legacy IT. Come join us to explore this future scenario!

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Keys to Successfully Applying Low-Code Automation and Development

Saikat Ray, VP Analyst, Gartner

Modern application technologies such as low code, RPA, ChatGPT and other AI tools are making it difficult for CIOs to manage enterprise IT data and information systems. In this session, you will learn how to proactively manage these new technology initiatives with IT; track and monitor deployed solutions; and create control points to protect data security and create new norms for segregation of duty.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Pitfalls to Avoid in CIOs' Strategic Cost Optimization Efforts

Cesar Lozada, Director Analyst, Gartner

CIOs continue to experience cost pressures due to their geography or global pressures. This session provides new insights into the pitfalls mature organizations avoid and how they optimize their costs more effectively.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Don't Just Add to Your Customer Experience — Subtract From It

Michael Chiu, VP Analyst, Gartner

The customer experience (CX) is typically additive. But another path to CX improvement is via subtraction. What can you remove from your CX to make it better? What blockers are preventing a better CX, and how can you eliminate those blockers? How do you utilize a "stop doing" list? This session explains how to effectively utilize subtraction to improve your CX.

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Wednesday, October 18, 2023 / 02:15 PM - 02:45 PM EDT

## Case Studies in Making Culture Change Happen

Christie Struckman, VP Analyst, Gartner

Many CIOs continue to struggle to make culture change happen within their organizations. This session will share three case studies of clients that have used Gartner's 5 Steps for Culture Change model. These clients have successfully driven culture change in their organizations, and the session will cover common challenges and best practices.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## Use Objectives and Key Results to Focus and Align Your Enterprise

Christie Struckman, VP Analyst, Gartner

CIOs are adopting OKRs to achieve strategic focus and alignment. Technology implementation and execution require a coordinated effort between IT teams and business capability teams, and between central and distributed IT teams across the enterprise. CIOs who leverage OKRs ensure successful engagement and co-development of actions between their IT teams and the right business capability teams.

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Wednesday, October 18, 2023 / 04:15 PM - 04:45 PM EDT

## Powering Productivity: 5 Ways CIOs Can Boost IT Employee Output and Wellbeing

Lane Severson, Sr Director Analyst, Gartner

This data-driven session unveils IT employees' top drivers of productivity that are not currently being fulfilled. It provides 5 practical CIO actions that boost IT productivity without piling more work and more hours on employees. While the focus is on improving IT employee and team productivity, CIOs can also use the blueprint to impact knowledge worker productivity across the enterprise.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Executive Leadership Frameworks to Help CIOs Lead Upward and Across

Tina Nunno, Distinguished VP Analyst, Gartner

One of the greatest challenges for any executive, including CIOs, is leading up to influence the CEO, and across with other C-level peers. Leadership and decision frameworks can help improve executive influence and accelerate high-quality executive decision making. This session will focus on some of the most powerful leadership frameworks and how CIOs can use them.

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Wednesday, October 18, 2023 / 05:15 PM - 05:45 PM EDT

## Digital Leadership at Midsize Enterprises: Who Does What?

Kristin Mettraux, VP, Research, Gartner

Digital initiatives stall when there is unclear leadership or ineffective checks and balances. As CIOs at midsize enterprises are expected to work closely with the executive suite, it is important to understand where and how to best allocate their resources. Join this breakout to review MSE benchmarks and best practices on digital leadership.

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Thursday, October 19, 2023 / 09:00 AM - 09:45 AM EDT

## Guest Keynote: Collaborating with AI: The Future of Creativity

Taryn Southern, Award-winning Artist, Storyteller and Strategist,

Pioneering content creator and AI artist Taryn Southern has worked at the intersection of technology and storytelling for more than a decade. Her collaborations with AI include composing chart-topping pop songs, bringing historical photos to life, producing her own digital video clone, even optimizing her health after a harrowing health diagnosis. In this session, Taryn shares how AI can be used to inspire creativity and personal transformation in your business - and life.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Scale Your Digital Transformation with Enterprise Agile

Donna Scott, Distinguished VP Analyst, Gartner

According to Gartner's 2023 board of directors survey, 89% of boards see digital as implicit to growth strategies, yet just 19% have seen progress toward their digital transformation goals. The enterprise lacks agility and speed in its management capabilities such as strategy, governance, program management, product management, and multidisciplinary delivery. This session will explore how CIOs can move digital transformation forward by applying agile principles across the enterprise.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Manage AI Risks Before They Manage You

Avivah Litan, Distinguished VP Analyst, Gartner

The pervasive adoption of ChatGPT woke us up to the urgent need to tackle AI risks and security head-on.

AI compromises — whether benign or malicious — lead to organizational harm and losses, such as theft of intellectual property, or compromise of sensitive data. Gartner presents a framework for managing AI trust, risk and security, including new processes and tools required to mitigate potential harm.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Responding to Critical Changes in Application Platforms and Architecture

Yefim Natis, Distinguished VP Analyst, Gartner

The experience of recent business disruptions and the relentlessly increasing pace of business change spurred a wave of CIO initiatives for the platform and business modernization. The platforms and the applications are reviewed, and their architecture revisited with an eye on greater agility. In this presentation learn how the CIOs' modernization initiatives lead their organizations to democratize, build composable, and decide in real-time.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Innovation Labs: A Capability to Navigate Through Volatile Business Environments

Peter Skyttegaard, VP Analyst, Gartner

A common reaction to times of disruption and uncertainty is to pause innovation initiatives, in particular reducing efforts on innovation labs. Actually, a well-organized innovation lab can become a critical ingredient to survive and thrive, as it reveals new opportunities to generate business success. In this session we will discuss the key steps of building an innovation lab, through an effective operating model, along with some real-time examples of organizations who successfully leveraged them to be prepared for uncertainties.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## How to Organize and Foster a Talent Marketplace for Business Technologists

Jason Wong, Distinguished VP Analyst, Gartner

More and more business technologists are building critical digital capabilities, yet most organizations don't have a formal approach to managing and cultivating their talent. CIOs must lead their business partners in organizing and fostering an internal marketplace that effectively trains and allocates business technologist talent to maximize their potential.

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Thursday, October 19, 2023 / 10:30 AM - 11:00 AM EDT

## Unlock Strategy Execution Success Through Your IT and Enterprise Operating Models

Joanne Kopcho, VP Analyst, Gartner

Constantly evolving strategic priorities requires CIOs to balance execution across the IT and enterprise operating models. To leverage execution success, CIOs need to understand dependencies between operating models, clarify capabilities and influence engagement. This session will help all leaders understand how these operating models connect to orchestrate operational success.

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Thursday, October 19, 2023 / 10:30 AM - 11:30 AM EDT

## Contract Negotiation Clinic: AWS, Azure and Google (Repeat)

Dolores Ianni, VP, Advisory, Gartner

Cloud infrastructure and platform services contract negotiation involve substantial opportunities and risks. While the negotiation fundamentals are similar, each cloud vendor has specific commercials that clients need to fully understand. In this interactive clinic, we will review the critical steps for negotiations, vendor differences and similarities to be aware of when negotiating to achieve the most optimal contract.

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Thursday, October 19, 2023 / 12:45 PM - 01:15 PM EDT

## 6 Universal Measures to Communicate the Business Value of IT

Robert Naegle, VP Analyst, Gartner

Business value metrics can feel impossible to define and harder to quantify. This session will explore six universal measures of value, how to build them, and how they can enhance and expand your IT and/or digital business value narrative.

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Thursday, October 19, 2023 / 12:45 PM - 01:15 PM EDT

## How to Continuously Measure and Optimize Your Digital Execution

Cesar Lozada, Director Analyst, Gartner



Benchmarking your digital execution KPIs against industry peers provides an objective fact base to gauge competitive position, and to identify and launch initiatives that can be quantified and optimized. Learn how to continuously optimize and improve IT operations and digital platforms in order to achieve your strategic digital priorities.

Thursday, October 19, 2023 / 02:00 PM - 02:30 PM EDT

## Data Fabric or Data Mesh: Deciding Your Future Data Management Architecture

Mark Beyer, Distinguished VP Analyst, Gartner

Data mesh is touted as the next-generation data management architecture based on domain-driven, distributed data management. Data fabric, on the other hand, does not believe in rip-and-replace and looks to utilize existing data management infrastructure. Organizations looking to evaluate either data fabric or mesh need practical guidance on the subject.

Thursday, October 19, 2023 / 02:45 PM - 03:15 PM EDT

## Becoming a World-Class Data Engineering Organization

Ramke Ramakrishnan, Sr Director Analyst, Gartner

This session will explore a strategic roadmap and approach for becoming a successful data-driven enterprise with principles, patterns, and best practices of data engineering to provide visible value to organizations.


[Back to Top](#)

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July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 South Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: AUTHORIZATION FOR CHIEF FINANCIAL OFFICER (CFO) TO ATTEND THE 2023 PUBLIC PENSION FINANCIAL FORUM (P2F2) CONFERENCE OCTOBER 8<sup>th</sup> – 11<sup>th</sup> IN DENVER, COLORADO.**

Dear Board Members:

Staff requests authorization for the Chief Financial Officer, La Valda R. Marshall, to attend the P2F2 conference in Denver, Colorado October 8<sup>th</sup> – 11<sup>th</sup>.

This years' conference focuses on Actuarial Concepts, Reports, Analysis, Trends and Case Study; Economic Updates; Ethics; Plan Governance; Investment Performance Measurement, Governmental Accounting Standard Board (GASB) Projects that Affect Pension Plans, Annual Accounting Financial Report (ACFR) Common Deficiencies; Secure 2.0 Provisions & Implementation; Best Practices in Investment Accounting and Artificial Intelligence in Financial Reporting.

The estimated cost to attend is approximately \$2,600, including registrations (Pre-conference and conference), airfare, hotel, meals and other (transportation and other legitimate services) related expenses. See Attachment A for the Estimated Travel Expense. See Attachment B for the Conference at a Glance (Agenda). Funds were included in the current budget for this trip.

VCERA staff will be pleased to respond to any questions you may have on this matter at the July 10, 2023 disability meeting.

**RECOMMENDATION: APPROVE.**

Sincerely,

Linda Webb  
Retirement Administrator

Attachments: Attachment A – P2F2 Conference Detailed Estimate of Travel Expense  
Attachment B – P2F2 Conference at a Glance (Agenda)

**P2F2 Conference**  
**October 8th - 11th**  
**Estimated Travel Expense for: La Valda R. Marshall**

ID	DESCRIPTION	DATE	ESTIMATE of COST		NOTES	
<b>A</b>	<b>REGISTRATION (Early Bird)</b>					
	Pre-Conference Registration & Materials		\$ 125.00		Interested in Actuarial and Economic Update Sessions	
	Conference Registration & Materials		\$ 800.00	\$ 925.00		
<b>B</b>	<b>AIRFARE</b>					
	Burbank to Denver (Round Trip)					
	Economy	Sunday	10/07/23	\$ 300.00	\$ 300.00	Delta Air Lines or United Airlines (Economical option)
	Business	Sunday	10/07/23	\$ 700.00	Pass	
<b>C</b>	<b>HOTEL</b>					
	Embassy Suites - Downtown/Convention Center				See: Denver Digest, July 3, 2023 - Volume 1	
		Sunday	10/07/23	\$ 265.00		Includes 15.7% Hotel Taxes
		Monday	10/08/23	\$ 265.00		Includes 15.7% Hotel Taxes
		Tuesday	10/09/23	\$ 265.00		Includes 15.7% Hotel Taxes
		Wednesday	10/10/23	\$ 265.00	\$ 1,060.00	Includes 15.7% Hotel Taxes
<b>D</b>	<b>MEALS</b>				See VCERA Education & Travel Policy	
	Dinner		10/07/23	\$ 48.00		Breakfast & Lunch provided at Conference
	Dinner		10/08/23	\$ 48.00		Breakfast & Lunch provided at Conference
	Dinner		10/09/23	\$ 48.00		Breakfast & Lunch provided at Conference
	Dinner		10/10/23	\$ 48.00	\$ 192.00	Breakfast & Lunch provided at Conference
<b>E</b>	<b>MILEAGE</b>					
	Will Use Metrolink		10/07/23	\$ -		No Mileage planned
	Will Use Metrolink		10/11/23	\$ -	\$ -	No Mileage planned
<b>F</b>	<b>OTHER</b>					
	Train: Metrolink					
	From Oxnard - Burbank		10/07/23	\$ 25.00		Train
	From Burbank - Oxnard		10/11/23	\$ 25.00	\$ 50.00	Train
	Tips - Other legitimate Services		10/07/23	\$ 10.00		Tips and/or Other Legitimate Services
	Tips - Other legitimate Services		10/08/23	\$ 10.00		Tips and/or Other Legitimate Services
	Tips - Other legitimate Services		10/09/23	\$ 10.00		Tips and/or Other Legitimate Services
	Tips - Other legitimate Services		10/10/23	\$ 10.00		Tips and/or Other Legitimate Services
	Tips - Other legitimate Services		10/11/23	\$ 10.00	\$ 50.00	Tips and/or Other Legitimate Services
	Rounding			\$ 23.00	\$ 23.00	Rounding estimate
<b>P2F2 Estimate of Travel Expense</b>				<b>\$ 2,600.00</b>		

**P2F2 20th Annual Conference  
Denver, Colorado**

**CONFERENCE AT A GLANCE**

**Sunday, October 8, 2023**

**Pre-Conference**

<b>Time</b>	<b>CPE</b>	<b>Session Name</b>
9:00 AM - 10:15 AM	1.5	Actuarial Concepts <i>Cavanaugh Macdonald, Cheiron, GRS</i>
		Economic Update <i>J.P. Morgan, State Street</i>
10:30 AM - 11:45 AM	1.5	Actuarial Reports, Analysis, Trends, Case Study <i>Cavanaugh Macdonald, Cheiron, GRS</i>
		Economic Update - Panel Q&A <i>J.P. Morgan, State Street</i>
<b>11:45 AM - 1:00 PM</b>		<b>Lunch for Pre-Conference Attendees</b>

**Main Conference**

1:00 PM - 1:50 PM	1.0	Ethics - Be the Leader You Would Follow <i>Corey Ciocchetti</i>
2:00 PM - 2:50 PM	1.0	The Burning Shield <i>Jason Schechterle</i>
3:05 PM - 3:55 PM	1.0	Plan Governance <i>David Maurek</i>
4:05 PM - 4:55 PM	1.0	Body Language
<b>5:00 - 5:25</b>		<b>New Member Welcome / Orientation</b>
<b>5:30 PM - 7:30 PM</b>		<b>Conference Welcome Reception</b>

**Monday, October 9, 2023**

<b>Time</b>	<b>CPE</b>	<b>Session Name</b>
8:30 AM - 9:00 AM	0.0	Welcome Remarks, Conference Logistics, Sponsor Intros <i>P2F2</i>
9:00 AM - 10:40 AM	2.0	Ethics Session <i>Marianne Jennings</i>
10:55 AM - 11:45 AM	1.0	GASB Update <i>GASB</i>
<b>11:55 AM - 1:00 PM</b>		<b>Lunch</b>

Time	CPE	Session Name
1:00 PM - 1:50 PM	1.0	Subscription-Based Information Technology Arrangements <i>Plante Moran, OPERS</i>
		Investment Performance Measurement / Reporting <i>Karen Vincent</i>
		Employer Education & Training <i>Panel - Pension Systems</i>
		Digital Balance - Seizing the Day Over Seizing Your Phone <i>Jeff Wozer</i>
		Is Your ESP Giving You Grief? <i>Deloitte</i>
2:00 PM - 2:50 PM	1.0	GASB Projects That Affect Pension Plans
		Unitizing Your Portfolio <i>Panel - Pension Systems</i>
		Employer Audits <i>EY, Utah Retirement Systems</i>
		Experience Famine - Too Much Viewing, Not Enough Doing <i>Jeff Wozer</i>
		Roundtable - ERPs and Accounting Software <i>Panel - Pension Systems</i>
<b>2:50 PM - 3:20 PM</b>		<b>Ice Cream Social (30 Minues)</b>
3:20 PM - 5:00 PM	2.0	ACFR and PAFR Common Deficiencies <i>GFOA, Moss Adams</i>
		T+1 Settlement <i>Panel - BNYMellon, Fifth Third, JPMorgan, Northern Trust</i>
		Employer Reporting Roundtable <i>Panel - Pension Systems</i>
		Communicating Effectively <i>David Markwardt</i>
		RPA / Automation in Pension Systems <i>EY</i>
		<b>Dinner On Your Own - Explore Denver Cuisine</b>

Tuesday, October 10, 2023

Time	CPE	Session Name
8:00 AM - 9:40 AM	2.0	Behavioral Economics <i>Gary Belsky</i>
9:55 AM - 10:45 AM	1.0	Actuarial Considerations With an Aging Population <i>GRS</i>
11:00 AM - 11:50 AM	1.0	How Rating Agencies Analyze Pension Plans <i>Segal</i>
<b>11:50 AM - 1:15 PM</b>		<b>Business Lunch</b>

Time	CPE	Session Name
1:15 PM - 2:05 PM	1.0	SECURE 2.0 Provisions & Implementation <i>Eide Bailey</i>
		ESG Diversity and Mandates <i>Clearwater, Investment Control Systems</i>
		Employer Contribution Reporting <i>Panel - Pension Systems</i>
		Dying to Laugh <i>Stacy Pederson</i>
		Data Analytic / Visualization Tools <i>CliftonLarsonAllen</i>
2:20 PM - 3:10 PM	1.0	ASOP 4 Toolkit
		Best Practices in Investment Accounting <i>UHY</i>
		Return to Work Reporting
		Seven Habits of Highly Stressed People <i>Stacy Pederson</i>
		Communication Tools, Tips & Tricks <i>Panel - Pension Systems</i>
3:25 PM - 4:15 PM	1.0	Artificial Intelligence in Financial Reporting
		Fee Validation <i>Albourne, Colmore, Qashqade</i>
		Innovations in Employer Reporting Software
		Taking on Today's Workforce Challenges <i>Moss Adams</i>
		ACFR - More Than Just Words <i>Workiva</i>
5:00 PM - 8:00 PM	<b>Evening Event - Empower Field at Mile High Stadium</b> <b>Buses board at hotel at 4:45 PM</b> <b>Last bus leaves Mile High Stadium at 8:00 PM</b>	

Wednesday, October 11, 2023

Time	CPE	Session Name
8:00 AM - 8:50 AM	1.0	Economic Update <i>KPMG</i>
9:00 AM - 9:50 AM	1.0	Tax Update <i>Ice Miller</i>
10:05 AM - 10:55 AM	1.0	Legislative Update <i>Leigh Snell</i>
11:05 AM - 11:55 AM	1.0	Cyber Security <i>PBI, OPERS</i>
<b>11:55 AM</b>		<b>Adjourn</b>





July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 S. Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: BOARD REQUEST TO DISCUSS VCERA'S AGENDA MANAGEMENT SOFTWARE**

Dear Board Members:

Trustee Goulet requested that this item be placed on the agenda for Trustees to discuss their experience with VCERA's agenda management software, PrimeGov.

VCERA staff request that trustees identify their specific concerns, so that staff can review, research and follow up.

**RECOMMENDATION: PROVIDE FEEDBACK TO STAFF ON SPECIFIC USE CASE ISSUES.**

Staff will respond to any of your questions on this matter at the July 10, 2023 Disability Meeting.

Sincerely,

Leah Oliver  
Chief Technology Officer

*Law Office of  
BARBARA MACRI-ORTIZ  
P.O. Box 6432  
Oxnard, California 93031*

*Telephone: (805) 486-9665*

*Facsimile: (805) 487-1409  
E-mail: [b.macriortiz@verizon.net](mailto:b.macriortiz@verizon.net)*

*Via email to: [Josiah.Vencel@ventura.org](mailto:Josiah.Vencel@ventura.org) & U.S. MAIL*

July 3, 2023

VCERA Board of Retirement  
1190 S. Victoria Ave., Suite 200  
Ventura, CA 93003

***RE: VENTURA COUNTY'S REQUEST FOR VCERA BOARD REVIEW OF  
PROCEDURES IN FAST TRACK CASES***

Dear VCERA Board Members:

I recently received a copy of the June 14, 2023, letter that was sent to you on behalf of the County of Ventura by Sevet Johnson, PsyD, County Executive Officer and Catherine Laveau, Senior Deputy Executive Officer, Risk management/Workers Compensation & Disability Management.

As explained in that letter, there is a pending fast-track case where the County and VCERA's staff respectfully disagree as to whether the evidence supports that Service-Connected benefits are owed to the deceased employee's widower. I am the attorney who represents the deceased employee's widower.

VCERA's staff is recommending benefits not be granted, whereas the County believes the evidence supports granting death benefits. As stated in the County's letter:

“The County believes the serious/tragic nature of the case in question, and the undisputed position of VCERA's staff that these facts support fast-track processing should allow the Board to at least consider the case, prior to it being automatically moved to a full evidentiary hearing, where additional

Letter to VCERA Board of Retirement

RE: Ventura County's Request for VCERA Board Review of Procedures in Fast Track Cases under "New Model Process"

July 3, 2023

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delay is inevitable. Without this step, Trustees do not have knowledge of the fact that the County believes the current evidence supports benefits are due and cannot consider this prior to the member or the member's heir being required to go through the inevitable delays associated with the hearing process."

The County requested that its memorandum be placed on the June 26, 2023, Agenda for discussion and consideration. I understand after review of the VCERA Agenda for its June 26, 2023 meeting, that an item was placed on the Agenda under New Business, Section VIII. B. [The County's letter is found on pages 623-624 of the Board Packet]. Unfortunately, I was not notified in advance that this matter had been placed on the agenda for the meeting, and thus, neither I nor my client attended the Board meeting.

I also understand that at your meeting Mr. Vencel may have made some representations attributed to me, based on a telephone conversation that I had with him at 4:50 p.m. on June 14, 2023. Mr. Vencel called me to explain that in accordance with the Notice of Final Recommendation that had been served on my client on June 6, 2023, my client had 30 days to decide whether to waive his right to a hearing or withdraw his disability application without prejudice. I explained that we intended to go forward with the evidentiary hearing, but that I was not prepared to cut short the 30 day period, especially because I was scheduled to go on vacation [for the week of June 18 - June 23], and I would need a significant amount of time to fully prepare for the evidentiary hearing.

At no time during that conversation was I informed that the County wished to bring this matter to the Board or that it would appear on the Board's June 26, 2023 Agenda. It should be noted that I returned from my vacation on June 23<sup>rd</sup>, so I was available to attend your June 26<sup>th</sup> Board meeting. Had I been so informed I and my client would have both been present at the Board meeting and would have provided public comment for the Board's consideration.

With all due respect, it appears that neither my client's interests, nor Ventura County's legitimate concerns were given sufficient consideration by the Board at its June 26<sup>th</sup> meeting. Therefore, I respectfully request that this matter be brought back to the Board at either its July 10, or July 24, 2023 meeting. The County is correct with respect to the assertions in its June 14<sup>th</sup> letter that the nature of this case is indeed serious and tragic, and that the facts support fast-track processing. It makes no sense to me that the Board

Letter to VCERA Board of Retirement

RE: Ventura County's Request for VCERA Board Review of Procedures in Fast Track Cases under "New Model Process"

July 3, 2023

Page 3

should not at least have an opportunity to consider the case, prior to it being automatically moved to a full evidentiary hearing.

Please understand that my practice area is not retirement law. I have never before had a case before this Board. In fact, I just learned this week from a local attorney who has practiced before this Board that we are looking at a procedure that could easily take much longer than a year or two, with the potential for litigation in the Superior and Appellate Courts. There is no question that such a protracted procedure would put a significant burden on my client, both emotionally and financially. Thus, for me, the County's statement in its letter that "additional delay is inevitable" takes on new meaning.

I implore this Board to place this matter on the Board's Agenda for either its July 10<sup>th</sup> or July 24, 2023, Board meeting. The Board should honestly and deliberately consider the County of Ventura's legitimate Request, i.e. for the Board of Retirement to review and revise the New Model Disability Process, in order to require an additional step of Board approval prior to VCERA directing the applicant to an evidentiary hearing in Fast Track cases when the County disagrees with VCERA Staff's Final Recommendation of Denial.

It is bad enough that my client had to lose his wife as a result of a shocking, fatal accident as she was crossing the street to attend a community event in the course and scope of her employment as an elected official. It would be totally inconsistent with the Board's policies and procedures, much less common decency and fairness, if the Board were to turn its back on this "fast-track" case without even hearing why the County believes the service related retirement should be granted. I agree with the County that it is totally appropriate to address this case in real time. Please understand that a grave injustice will be perpetuated if the Board allows this case to slowly wind its way through the system without any consideration.

Respectfully Submitted,



Barbara Macri-Ortiz  
Attorney for Roy W. Prince

cc: Sevet Johnson, PsyD, Ventura County Executive Officer  
Catherine Laveau, Senior Deputy Executive Officer, Ventura County Risk Management/Workers Compensation & Disability Management



July 10, 2023

Board of Retirement  
Ventura County Employees' Retirement Association  
1190 S. Victoria Avenue, Suite 200  
Ventura, CA 93003

**SUBJECT: PBI RESEARCH SERVICES - GLOBAL MOVEIT TRANSFER CYBERATTACK**

Dear Board Members:

VCERA contracts with PBI Research Services (PBI) for death and beneficiary audit services. At the end of May 2023, a third-party file transfer software, MOVEit, that is used by PBI, identified a vulnerability in its software that was actively exploited by attackers. The exploit provided attackers the ability to gain access to the MOVEit Administrative Portal only.

PBI confirmed that clients who were potentially impacted were contacted directly. VCERA did not receive direct communication from PBI, however staff contacted them directly and PBI confirmed that they do not have evidence that VCERA records were impacted.

Upon receipt of PBI's confirmation, VCERA staff believe that this breach did not impact VCERA's information systems, Member Portal or VCERA benefits for members/beneficiaries.

The PBI Press Release is attached and VCERA staff will be pleased to respond to any questions you may have on this matter at the July 10, 2023, Disability Meeting.

**RECOMMENDATION: RECEIVE AND FILE.**

Sincerely,

Leah Oliver  
Chief Technology Officer

**Oliver, Leah**

---

**From:** PBI Research <pbiproduct@pbinfo.com>  
**Sent:** Friday, June 23, 2023 4:02 AM  
**To:** VCERA-AP  
**Subject:** Global MOVEit Transfer Cyberattack

**WARNING:** If you believe this message may be malicious use the Phish Alert Button to report it or forward the message to [Email.Security@ventura.org](mailto:Email.Security@ventura.org).



## Global MOVEit Transfer Cyberattack



In late May, the federal government, state governments, universities, healthcare organizations, and corporations in the United States and around the world were impacted by a cyberattack.

Progress Software, owner of the MOVEit application file transfer software, had a zero-day vulnerability that was exploited by cybercriminals. A zero-day event indicates it was a previously unknown vulnerability in the MOVEit Transfer secure file-sharing platform. According to public reports, cybercriminals accessed the personal information of potentially millions of people across the above-mentioned groups.

PBI uses the MOVEit Transfer software to accept and share files. Unfortunately, the cybercriminals were able to access and obtain records for a small percentage of our clients. **While PBI was impacted, the cybercriminals did not gain access to PBI's core systems or software.**

Upon becoming aware of the compromise, PBI immediately patched its instance of MOVEit, assembled a team of cybersecurity and privacy specialists, contacted federal law enforcement, and began notifying potentially impacted clients. All impacted clients have been notified. **If you were not contacted, we do not have evidence you were impacted.**

At PBI we are focused on being completely transparent and responsive about this event. We are working directly with impacted clients to identify any information

that may have been compromised, build a communication plan, and reach out to consumers. Client partnerships are extremely important to us, and we are working diligently to do what's best for our clients and their participants.

If you have questions, please visit our FAQ or email us at [moveitsecurity@pbinfo.com](mailto:moveitsecurity@pbinfo.com)

[Read the F.A.Q.](#)



PBI Research, 333 South 7th Street, Suite 2400, Minneapolis, MN 55402, United States, 415-482-9611

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# NEWS CLIPS

## Calstrs Affected by Same Data Breach that Hit Calpers, Genworth

*The cyberattack has impacted the two largest public pension systems in the United States, compromising the data of over a million people.*

By **Justin Mitchell**|FundFire

The **California State Teachers' Retirement System** was hit by the same cyberattack that compromised the data of nearly 770,000 members of its sister system, the **California Public Employees' Retirement System**, as well as about 2.5 million people connected to insurer **Genworth Financial**, the pension confirmed Friday.

About 415,000 members and beneficiaries of the \$309 billion teachers' pension, called Calstrs, were affected, a spokesperson said in an email. The files involved included names, Social Security numbers, dates of birth and ZIP codes, the spokesperson added. No pension payments were affected by the incident. Calstrs' involvement was **first reported** by KCRA, a local news station.

On June 4, Calstrs was informed by one of its vendors, **PBI Research Services**, that its systems were involved in a "recent mass exploit of a vulnerability," in one of its file transfer systems, the spokesperson said. On June 8, the system learned it involved the personal information of some of its members and beneficiaries. Calstrs determined how many people were impacted on June 16. The incident did not involve any unauthorized access to its network, the spokesperson emphasized.



Despite the time gap between when it learned of the breach and when it disclosed it, the pension insisted it had worked fast to address the issue.

“Calstrs is committed to ensuring the privacy and security of our members’ personal information, and we know that members are concerned,” CEO **Cassandra Lichnock** said in an emailed statement. “Calstrs acted as quickly as possible to notify the members whose information was involved.”

Members and beneficiaries impacted by the breach will be sent letters this week identifying resources available to help them protect their personal information, as well as contact information for a dedicated call center to answer questions. Calstrs is “evaluating the relationship” it has with PBI as well as other possible security measures, the spokesperson said.

PBI informed the \$461 billion public employees’ pension, called Calpers, on June 6 that its data had been breached, as reported. Like Calstrs, the vulnerability was found in a file transfer application called MOVEit, which allowed a third party to download the data.

The attack on the two pensions, which are the largest in the U.S., is part of a larger pattern of attacks from a Russian-speaking gang called “Clop” which often targets secure file-transfer software, according to the Financial Times.

The U.S. Department of Energy, British Airways, the British Broadcasting Company, Louisiana’s Office of Motor Vehicles and Oregon’s Department of Transportation were also hacked, according to the Associated Press.

Calpers has set up a dedicated web page, email address and phone number to field member questions, according to a press release last week. It is also sending individual letters to all the affected members, CEO **Marcie Frost** told its board during a routine report at its June 22 meeting.

“I’d like to thank our Calpers members for the trust that they do place with Calpers to protect their interests and provide for their futures, but I do say that

with some humility this morning,” she said. “I think we can all understand their fear, and frankly, their frustration.”

In the release, Frost called the breach “inexcusable” and said Calpers members deserved better. She added that the system has taken steps to protect their information.

Calpers waited several days to inform its members of what happened because PBI’s initial communication on June 6 did not provide “sufficient detail as to the scope of the data that was impacted and the individuals to which that data involved,” the pension says on a **frequently asked questions page** posted on its website. After it received the information, it moved quickly to set up services for its members.

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“We recognize the need for timely, accurate communication and we share the frustrations this third-party vendor breach has created for Calpers members and their families,” the page says.

One insurer, Genworth Financial, was also affected by the breach, the company confirmed in an email message. The hack was estimated to have taken place from May 29 to May 30, according to its **website**. On June 2, PBI implemented fixes to the MOVEit system provided by the application's owner, **Progress Software**, the FAQ said.

The breach affected between 2.5 million and 2.7 million people who are both clients and insurance agents, and included life insurance, individual long-term care insurance and annuity customers, and could have included social security numbers, names, dates of birth, zip codes, states of residence, full addresses and policy numbers.

“The company believes that the PBI security event has not had any impact on any of the company’s information systems, including its financial systems, and that there has not been any material interruption of the company’s business operations,” Genworth said in a public filing detailing the incident.

“The company does not currently believe this incident will have a material adverse effect on its business, operations, or financial results.”

A Genworth spokesperson declined to comment further. Calpers and Genworth are both providing free credit monitoring services to those affected.

PBI provides “death identification” services for public pensions and other financial entities. While PBI does work with many corporate pensions, public pensions, multi-employer pensions and insurance companies, according to its website, not all clients used the compromised software. Another client of the company, the **Nevada Public Employees’ Retirement System**, called Nevada PERS, said it was unaffected.

“To the absolute best information that we have from PBI and our internal IT staff, Nevada PERS data is not affected by this event,” the \$56 billion system said in a statement on its website. “We do not use the application internally and the method by which we transferred data to PBI also did not use the application.”

The **New Jersey Division of Pensions & Benefits**, which oversees \$95.3 billion in assets, and the **Michigan Education Association**, or MEA, a teachers’ union, are also mentioned on the PBI website as clients. MEA’s data was not affected by the breach, a spokesperson told FundFire. New Jersey declined to comment.

PBI did not respond to a request for comment by press time.