



myCalPERS Reports Optimization Project:

Empowering Decision-Making Through Modern Analytics

State: California

Agency: California Public Employees' Retirement System

Award Category: Data Management, Analytics & Visualization

Project Dates: December 2024 – March 2026

Contact: Stephenson Loveson, Chief Information Officer
stephenson.loveson@calpers.ca.gov



Executive Summary

The California Public Employees' Retirement System (CalPERS), the largest public pension fund in the United States, embarked on a transformative initiative to modernize its data management and analytics capabilities. CalPERS uses a custom-built software application named myCalPERS to manage pension benefits and health plan coverage for 2.4 million retirement plan members and 1.5 million health plan subscribers and dependents. The myCalPERS Reports Optimization Project was designed to address the critical need for timely, accurate, and actionable information across the organization and its external business partners. By replacing the legacy myCalPERS reporting platform with the new myCalPERS Reports platform and by migrating key business intelligence reports to Microsoft's Power BI service and transactional reports to a tightly coupled, in-house designed & developed reporting platform, CalPERS has empowered its stakeholders with advanced data visualizations and robust analytics. This modernization effort aligns with CalPERS' commitment to organizational excellence, improving processes and advancing technologies to drive efficiency and effectiveness.

The project's scope was ambitious, focusing on report rationalization. The beginning report inventory was approximately 600 reports. A thorough review of the report inventory resulted in the decommissioning of 100 reports and the migration of the remaining 500 reports. Internal users and external partners now benefit from streamlined access to pension and health plan information, enabling faster, data-driven business operations. The new reporting platforms not only enhance user experience but also deliver measurable operational improvements, including reduced report processing times, increased scalability, and reduced IT maintenance and operations commitments. Through targeted communications, stakeholder engagement, training sessions, and user-friendly guides, CalPERS ensured broad awareness and adoption of the new tools, fostering a culture of agile analytics and continuous improvement.

Collaboration was central to the project's success. The CalPERS Pension & Health System Reporting Team worked closely with business units, governance committees, and support teams to ensure the solution met the diverse needs of CalPERS' vast constituent base. Stakeholder feedback was actively sought during user acceptance testing, resulting in the identification and resolution of issues prior to launch. The project's technical architecture, featuring a dedicated reporting database and integration with Power BI, was carefully designed to prioritize reliability, data freshness, and scalability.

Ultimately, the myCalPERS Reports Optimization Project has transformed the organization's approach to data analytics and reporting. While the technology enhancements are not visible to CalPERS members and partners, they now benefit from a modern, scalable reporting platform that supports timely access to information, agile data analytics, and operational efficiency.

IDEA

What problem or opportunity does the project address?

CalPERS faced mounting challenges with its legacy myCalPERS reporting platform, including increasing maintenance obligations and challenges in adapting to modern processes and systems. Additionally, the outdated technology stack made it increasingly difficult to recruit IT professionals with the necessary expertise, as modern developers prefer working with current, industry-standard tools. Shorter release cycles were also needed to deliver the turnaround times required by CalPERS business teams. The opportunity was clear. We needed to replace the myCalPERS legacy reporting solution with a modern, internally-built reporting platform (myCalPERS Reports platform) for high-volume and transactional reporting and migrate business intelligence (BI) reports to Microsoft Power BI, leveraging advanced analytics and visualization capabilities.

Why does it matter?

With 2.4 million retirement plan members and 1.5 million health plan subscribers and dependents, and approximately 3,000 external business partners, CalPERS' reporting needs are vast and complex. By modernizing its data reporting platform, CalPERS improved business processes, reduced software expenses, and empowered stakeholders with faster access to the actionable information they need. The consequences of not addressing these issues included continued reliance on legacy software, slower response times, and diminished stakeholder satisfaction.

Relevant Data:

- Migrated ~400 reports to the myCalPERS Reports application reporting platform
- Migrated ~100 reports to the Microsoft Power BI data analytics service
- Many reports can now be delivered on an ad-hoc basis, whereas previously, reports were only released as part of large, scheduled application releases that occurred every couple of months. Some reports are now delivered within days. This shift enables improved responsiveness to business needs.
- The new myCalPERS Reports and Power BI platforms feature a much simpler and more intuitive user interface compared to the legacy reporting platform, making it easier for users to find, access, customize, and interpret their data.
- Enhanced performance:
 - In addition to performance improvements to smaller reports, long running myCalPERS Reports now process on average in 20 minutes vs. 50 minutes on the prior legacy reporting platform
 - Power BI reports now process on average within seconds to minutes vs. 50 minutes on the legacy reporting platform

What makes it different?

The project stands out for its enterprise-wide approach, internally developed myCalPERS Reports platform, and seamless integration with Microsoft Power BI for advanced analytics. CalPERS prioritized user experience and stakeholder engagement, delivering platforms that are significantly more intuitive and user-friendly than the legacy reporting platform. The new interfaces make it easier for users to access, customize, and interpret their data. Additionally, the Power BI platform introduces a level of data visualization that was not previously available, allowing users to gain deeper insights and make more informed decisions through interactive dashboards and visual analytics. The solution also offers faster data access, significantly improved turnaround time of report changes, fixes, and requests for new reports, and streamlined workflows.

What makes it universal?

Efficient, scalable data management is a universal mandate for state government. This project addresses State CIO Top Ten Priorities, including data management, analytics, and digital government experience. The challenges of legacy system modernization, cost control, and improved citizen engagement are shared by all states, making CalPERS' solution a model for public sector innovation.

IMPLEMENTATION

What was the roadmap?

The project followed a structured roadmap:

- **Development Start:** December 2024
- **System Test Concluded:** September 2025
- **User Acceptance Testing (UAT):** August 2025 – January 2026
- **Release:** March 7, 2026

CalPERS adopted an enterprise view, aligning the initiative with organizational goals for process improvement and technology advancement. Project management emphasized stakeholder collaboration, iterative testing, and clear success metrics—such as report migration completion, performance benchmarks, and user adoption rates.

Who was involved?

Key groups included:

- CalPERS Pension & Health System Reporting Team (Project Core Team)
- Business units across CalPERS
- Pension & Health Governance Committee
- myCalPERS system support teams

- External business partners (public agency and public-school employers)

Stakeholder buy-in was achieved through targeted communications, training, and outreach:

- Power BI Roadshow for ~400 internal reporting platform users
- Data Steward Committee presentations
- CalPERS Educational Forum presentation to business partners
- CalPERS website updates
- User guides and enterprise report catalogs
- Virtual and self-paced training courses provided to external business partners

How did you do it?

Resources included:

- Dedicated project team, including business analysts, technical leads, and support staff
- Multi-phased migration and testing for over 15 months

Technical architecture highlights:

- Internally built myCalPERS Reports platform
- Microsoft Power BI for advanced analytics and visualization
- Offloaded reporting workloads to dedicated reporting databases that are synchronized with the myCalPERS application for data timeliness and consistency
- Optimized report performance as the report inventory was migrated to the new platforms

IMPACT

What did the project make better?

The CalPERS Pension & Health System Enhanced Data Solution transformed reporting and analytics:

- Provided users with easier access to critical pension and health data, simplified navigation, and the ability to customize reports to meet specific needs.
 - Delivered modern myCalPERS Reports and Power BI platforms that are significantly more intuitive and user-friendly than the legacy system.
 - Introduced advanced visualization capabilities through Power BI, empowering users with interactive dashboards and visual analytics that were not previously available.
- Enhanced performance:

- In addition to performance improvements to smaller reports, long running myCalPERS Reports now process on average in 20 minutes vs. 50 minutes on the prior legacy reporting platform
- Power BI reports now process on average within seconds to minutes vs. 50 minutes on the legacy reporting platform
- Enabled ad-hoc report delivery, allowing business areas and partners to receive critical information outside of scheduled system releases, supporting faster responses to business needs and greater operational agility.
- A modern technology stack makes it easier for CalPERS to recruit and retain IT talent.

The environment before and after:

Before: Reliance on an aging reporting platform; delayed insights; limited scalability; limited data visualization options; difficult to recruit IT talent for legacy technology

After: Modern, scalable myCalPERS Reports and Power BI platforms; faster access to information; enhanced interactive data visualizations; significantly improved turnaround times for new report requests and enhancements to existing reports; enhanced stakeholder satisfaction; improved recruitment for IT professionals

How do you know?

Quantitative Data:

- Enhanced performance:
 - In addition to performance improvements to smaller reports, long running myCalPERS Reports now process on average in 20 minutes vs. 50 minutes on the prior legacy reporting platform
 - Power BI reports now process on average within seconds to minutes vs. 50 minutes on the legacy reporting platform

Qualitative Data:

Some of the positive feedback the project received includes the following:

- “The Power BI Portal has enabled better data access, improved reporting capabilities, and enhanced customer satisfaction across CalPERS.”
- “The CalPERS Pension & Health System Reporting Team has gone above and beyond the call of duty, setting a new standard for ITSB projects. Their work has enabled better data access, improved reporting capabilities, and enhanced customer satisfaction across CalPERS. I wholeheartedly recommend this team for this award in recognition of their outstanding contributions.”

- “March 7th, 2026, marked a new chapter for us with the launch of the myCalPERS Reports Optimization Project into production. This achievement was truly a testament to the power of teamwork. I remember when the idea was first pitched — it took some convincing, but the team’s perseverance paid off, delivering a major win for CalPERS and supporting our long-term sustainability. Kudos to everyone involved!”
- “The CalPERS Pension & Health System Reporting Team delivered an enhanced reporting solution with simplified user interfaces and expanded capabilities, making critical data more accessible and actionable. Through innovative report optimization and delivery, they empowered users to make informed decisions efficiently. Their successful roadshows with business partners resulted in an optimized report inventory that reduced technical support needs while ensuring business areas could access necessary data. This collaborative effort fostered relationships across CalPERS IT divisions and supported our continuous improvement initiative. By transforming complex reporting processes into intuitive, user-friendly solutions, the teams set a new standard for excellence and impact within CalPERS. These projects represent tremendous progress, and I want to extend my heartfelt thanks to everyone who contributed.”

What now?

Long-term plan:

- Ongoing maintenance and optimization of myCalPERS Reports and Microsoft Power BI platforms
- Continued stakeholder engagement and training
- Expansion of advanced analytics capabilities to support evolving business needs and acumen with data analytics

Investment rationale:

The investment in the CalPERS Pension & Health System Enhanced Data Solution is justified by its delivery of an analytics and reporting platform that is both scalable and sustainable. By transitioning to modern technologies such as the myCalPERS Reports and Power BI platform, CalPERS has reduced development overhead, enabling faster enhancements and easier maintenance. The adoption of widely used industry-standard tools also makes it significantly easier to recruit and retain talented IT professionals, ensuring ongoing support and innovation for the platform. This modern foundation positions CalPERS to respond quickly to evolving business needs, foster a culture of data-driven decision-making, and maintain operational excellence well into the future.