



## ENTERPRISE TECHNOLOGY PROJECTS

FISCAL YEAR 2019–20  
FIRST QUARTER REPORT

At the end of the first quarter for fiscal year 2019–20, CalSTRS had seven enterprise projects: five major technology projects over \$1 million and two additional projects under \$1 million.

Of the projects under \$1 million, one is scheduled to begin in January 2020 and the other is on hold and will be removed from the report until it is active again.

The Project Management Office (PMO) monitors and reports monthly on the technology appropriations budget and enterprise projects' status to the Enterprise Program Investment Council (EPIC) and quarterly to the Teachers' Retirement Board.

## ENTERPRISE PROGRAM INVESTMENT COUNCIL MEMBERS

**Jack Ehnes**

Chief Executive Officer

**Cassandra Lichnock**

Chief Operating Officer

**Julie Underwood**

Chief Financial Officer

**Lisa Blatnick**

Chief of Administrative Services

**Grant Boyken**

Public Affairs Executive Officer

**Ashish Jain**

Chief Technology Officer

**Vacant**

Benefits and Services Executive Officer

**Debra Smith**

Chief Operating Investment Officer









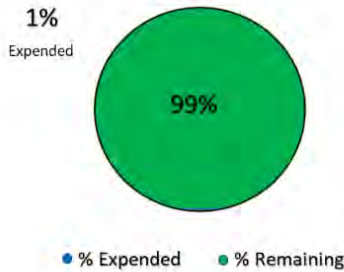
## MAJOR ENTERPRISE TECHNOLOGY PROJECTS

### SAP SUCCESSFACTORS

The SAP SuccessFactors project will improve efficiencies by automating Human Resource (HR) processes, delivering real-time data and a self-service platform for all CalSTRS staff. The solution includes a core HR platform and tools for time management, learning and development, performance and goals, succession planning, onboarding, workforce planning and analytics. This is a multi-year project that will be implemented in phases. Employee Central is the first module and includes a core HR platform and time management.

#### Project Budget

To Be Determined<sup>10</sup>



#### ACCOMPLISHMENTS – PERIOD ENDING SEPTEMBER 30, 2019

- Progressed current-state business process documentation (61%) and functional requirements refinement (67%) for Employee Central.
- Transitioned Project Manager (PM) role to new core team member.
- Additional Business Analyst (BA) added to the team to document interface and data requirements. Analysis has started and progressing efficiently.
- Solution name (HR Link) and icon selected.

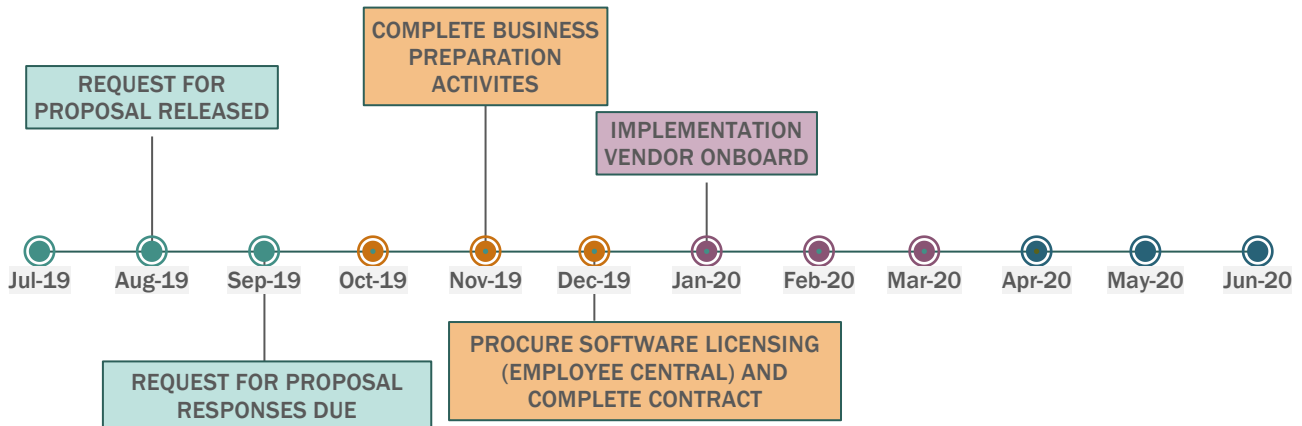
#### PLANNED MAJOR ACTIVITIES & MILESTONES BY DECEMBER 31, 2019

- Conduct vendor interviews for implementation services.
- Select vendor for implementation services and finalize contract.
- Procure software licenses leveraging the Software Licensing Program offered through the Department of General Services.
- Finalize current-state business process documentation and requirement refinement for Employee Central, including external interface requirements.
- Complete interface and data requirement analysis.
- Launch project site on Employee Central.
- Conduct internal change management activities to promote project awareness.

#### PROJECT SCHEDULE STATUS TIMELINE



#### FISCAL YEAR 2019–20 MAJOR MILESTONES



<sup>10</sup> SAP SuccessFactors – The project budget will be determined once procurement is finalized; expenditures to date cover a contract Business Analyst.

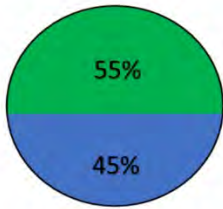
# MAJOR ENTERPRISE TECHNOLOGY PROJECTS

## TRANSFORMATION READINESS

The Transformation Readiness project (formerly Business Transformation) supports business areas and prepares staff for impacts, changes and benefits from large enterprise modernization efforts.

### Project Budget

\$16.4 Million



● % Expended ● % Remaining

### ACCOMPLISHMENTS – PERIOD ENDING SEPTEMBER 30, 2019

- Supported change and communication efforts to prepare for the soft launch of the Employer Readiness Environment go-live on October 7.
- Updated change management roadmaps for each business area affected by Pension Solution.
- Completed to-be process documentation to support change and testing preparation.
- Supported the final two-day system demonstration of system functionality.
- Completed and then published the Introduction to BenefitConnect computer-based training module to the CalSTRS learning management system.
- Held a Change Champion Network Quarterly meeting to increase project awareness and provide an opportunity for participants to share best practices.

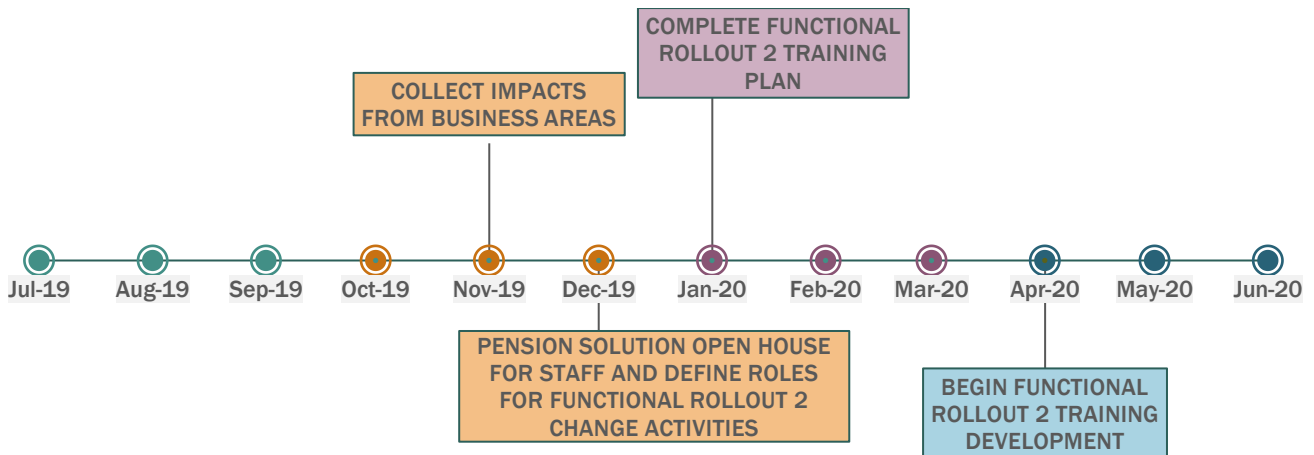
### PLANNED MAJOR ACTIVITIES & MILESTONES BY DECEMBER 31, 2019

- Verify readiness approach with affected business areas to define roles and responsibilities for change activities related to Functional Rollout 2.
  - Deliver process readiness overviews regarding Benefit Payroll, Service Credit Purchase and Community Property functions.
  - Develop Change Management for Leaders computer-based training module.
  - Deliver pilot “Leader’s Role in Change” training session.
  - Finalize first phase of employer-facing computer-based training modules and support employer readiness activities.
- Present Employer Readiness Environment overview training to increase awareness of affected Financial Services Branch staff.

### PROJECT SCHEDULE STATUS TIMELINE







### FISCAL YEAR 2019–20 MAJOR MILESTONES





**OTHER ENTERPRISE PROJECTS UNDER \$1 MILLION**

The following table summarizes other enterprise projects during the first quarter.

Project and Description	Project Duration	Schedule (Status)	Project Budget <sup>11</sup>	Budget Expended <sup>12</sup>	Budget (Status)
<p><b>SAP Concur (Travel and Expense Management)</b></p> <p>Adds a new digital service to the CalSTRS portfolio while significantly improving the end user experience. Provides travelers a “one stop shop” for all travel and expense needs which does not exist in the current application and significantly decreases the time it takes users to create and submit expense reports while reducing the high number of errors during the expense submission process.</p>	Estimate 8-10 months		\$845,000	\$0	
<p><b>FI\$Cal R17 Changes</b></p> <p>Updates file formats and file transfer processes necessary to support the exchange of files associated with the FI\$Cal project.</p>	Dec 2016 – Sep 2019	 <sup>13</sup>	\$319,965	\$209,926	

*Schedule & Budget Indicators*   ● *On Track*   ⚠ *Warning*   ● *Critical*   ✓ *Complete*   ✕ *Cancelled*   ⌚ *Not Started*

<sup>11</sup> Project Budget – Amount represents the sum of the projects’ prior years’ actual expended, remaining encumbrances, and current and future years budgeted amounts. In addition, those projects with a \$0 budget utilize internal resources and operational program budgets.

<sup>12</sup> Budget Expended – Amount represents the total expended.

<sup>13</sup> FI\$Cal R17 Changes – CalSTRS is ready to deploy and is awaiting FI\$Cal’s deployment date, as it is an external dependency. Due to the uncertainty of when FI\$Cal and SCO will be ready to go-live, this project has been placed on hold and will be removed from the report until there is something new to report.

