
CALSTRS

Enterprise Projects Fiscal Year 2011/2012 First Quarter Report

Enterprise Projects

Fiscal Year 2011/2012 – First Quarter Report

The Enterprise Program Investment Council (EPIC) is responsible for governance of all enterprise projects which includes prioritizing, allocating resources and providing oversight of the \$20 million annual EPIC budget.

The Project Management Office (PMO) monitors and reports on the EPIC Budget and enterprise projects monthly to EPIC and quarterly to the Teachers' Retirement Board.

Enterprise Program Investment Council Members

Christine Ford
Chief of Staff

Robin Madsen
Chief Financial Officer

Peggy Plett
Deputy Chief Executive Officer
Benefits and Services

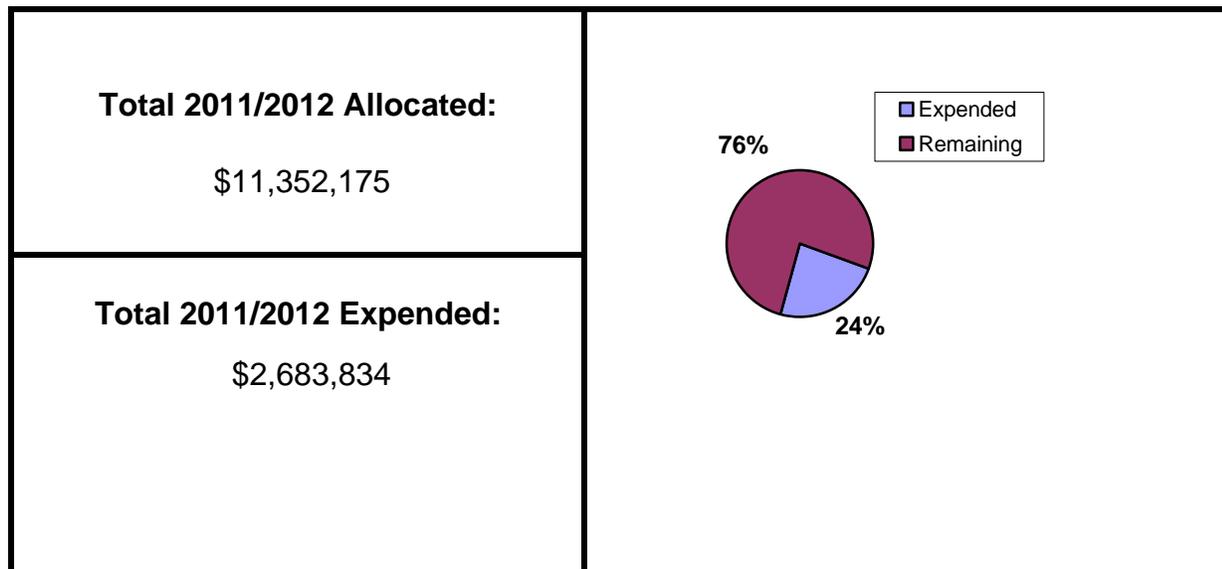
Ed Derman
Deputy Chief Executive Officer
Plan Design and Communication

Janice Hanson
Deputy Chief Executive Officer
Enterprise Initiatives and Technology

Ray Greenhouse
Chief Technology Officer

Total Enterprise Projects' 2011/2012 Budget: \$20 Million

As of September 30, 2011



Enterprise Projects

Fiscal Year 2011/2012 – First Quarter

Project Name	Duration	Project Total ¹	2011/2012 Budget	2011/2012 Expended ²	Schedule	Budget
Actuarial Valuation	Apr 08 – Jun 12	\$1,979,148	\$130,000	\$6,350	 ³	 ³
Annual Update	Jul 11 – Jun 12	\$89,050	\$89,050	\$22,075		
Anti-Spiking Discovery	Apr 11 – Aug 11	\$31,750	\$11,250	\$8,800		
Board Elections	Nov 10 – Mar 12	\$47,135	\$26,880	\$1,900		
BusinessRenew Requirements Management	Aug 11 – Jan 12	\$0 ⁴	\$0 ⁴	\$0 ⁴	 ⁵	N/A
BusinessRenew Corporate Accounting & Resource Management ³	Jan 11 – Aug 13	\$18,812,318 ⁶	\$15,168,713 ⁶	\$958,202 ⁶		
BusinessRenew Pension Solution Discovery	Dec 10 – Feb 12	\$5,104,487	\$1,571,262	\$239,858	 ⁷	
BusinessRenew Project Support	Jan 11 – Oct 19	\$8,034,700	\$2,014,000	\$104,921		
Cost Effectiveness Measurement	Jul 11 – Sep 11	\$1,700	\$1,700	\$1,700		
Investment Accounting ⁸	Oct 08 – Dec 11	\$2,771,500	\$827,000	\$0		
myCalSTRS Online Services for Teachers ⁹	Jan 09 – Dec 11	\$1,838,151	\$19,080	\$4,500		
Penalties and Interest	Dec 09 – Aug 12	\$11,185,000	\$4,524,153	\$2,082,832		
Pension Accounting Initiative	May 08 – Jul 12	\$6,372,839	\$0	\$0		
Priority Management Project Portfolio Management Tool	Aug 11 – Jun 12	\$396,360	\$396,360	\$20,150		
Project Management Office Program	Ongoing	\$741,440	\$741,440	\$190,748	N/A	
Project Risk Reserve	Ongoing	\$1,000,000	\$1,000,000	\$0	N/A	

Total Enterprise Projects' 2011/2012 Budget: \$20 million **Total 2011/2012 Allocated:** \$11,352,175 **Total 2011/2012 Expended:** \$2,683,834

Schedule & Budget Indicators:  **Acceptable**  **Warning**  **Critical**  **Complete**

¹ Project Total – amount represents the sum of the projects' prior years' actual expended amount and the current and future years budgeted amounts

² 2011/2012 Expended – includes project expenses paid and does not reflect expenses that have been accrued

³ Actuarial Valuation – schedule and budget in critical status due to unavailability of contractor to prepare final deliverable

⁴ BusinessRenew Requirements Management – this project is fully supported by internal resources

⁵ BusinessRenew Requirements Management – schedule warning due to lack of available resources

⁶ BusinessRenew Corporate Accounting & Resource Management – \$15.5 million funded through Board and contingency funds and is excluded in the Enterprise Projects' stated Budget, Allocated and Expended totals information. The project received an additional \$3.3 million in EPIC funding for fiscal year 2012/2013.

⁷ BusinessRenew Pension Solution Discovery – schedule warning due to delay in procuring a vendor

⁸ Investment Accounting – project initiated with contingency funding and received EPIC funding in January 2010. The amount displayed above reflects EPIC funding only.

⁹ myCalSTRS Online Services for Teachers - project initiated with contingency funding and received EPIC funding in November 2009. The amount displayed above reflects EPIC funding only.

Actuarial Valuation

The Actuarial Valuation project will provide CalSTRS with verification of the actuarial valuation processes, improve the current valuation process through the use of both technology and process improvement, and create detailed Actuarial Resources procedures.

Period Ending September 30, 2011:

- Completed training and transition of the Actuarial Data Mart to program areas.

Planned Deliverables by December 31, 2011:

- Finalize procurement strategy and initiate procurement process for vendor service to prepare the Detailed Internal Procedures Report.

Critical Warning: Project schedule and budget in critical status due to unavailability of contractor to prepare final deliverable.

Board Strategic Fit

Goal 1: Raise the quality in the delivery of benefits, products and services to best in class.

Objective D: Identify and eliminate internal and external data integrity problems.

Goal 3: Ensure a supportive and efficient organization and be an employer of choice.

Objective F: Identify and improve the efficiency of CalSTRS business.

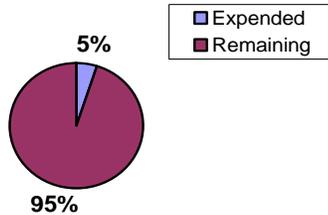
Major Fiscal Year 2011/2012 Milestones



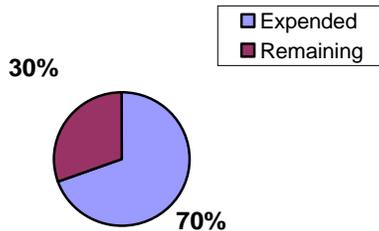
Project Schedule Status Timeline



2011/2012 Project Budget \$130 Thousand



Total Project Budget \$2 Million



Annual Update

The Annual Update process calculates fiscal year end contributions, interest and yearly service credit; transfers all necessary funds between the Defined Benefit and Defined Benefit Supplement accounts; as well as produces the *Retirement Progress Reports* (annual member statements).

Period Ending September 30, 2011:

- Completed development of Retirement Progress Report enhancements.
- Completed System Integration and User Acceptance testing.
- Migrated Annual Update enhancements to production.
- Received and updated a total of 9,600 addresses from the 22,000 address clean-up letters mailed; additionally 1,600 addresses were updated via *myCalSTRS*.

Planned Deliverables by December 31, 2011:

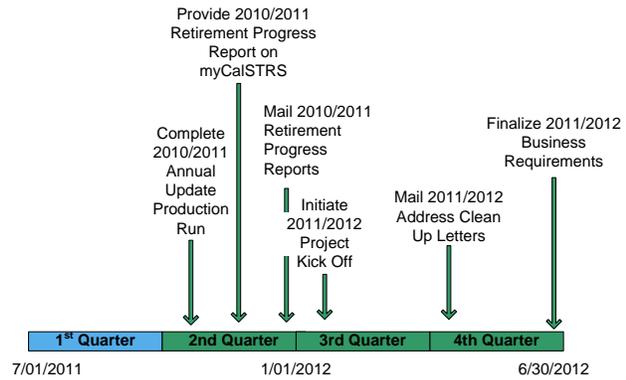
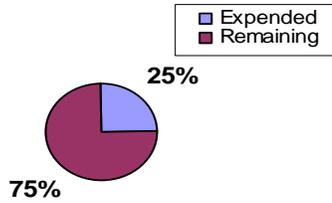
- Complete Annual Update corporate database production run.
- Provide Retirement Progress Reports on *myCalSTRS*.
- Provide Retirement Progress Report samples at the Teachers' Retirement Board meeting.
- Mail the 2010/2011 Retirement Progress Reports to members.

Key Operational Initiative

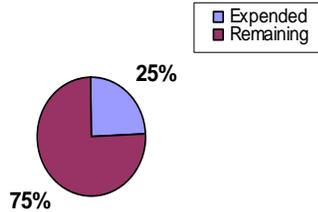
Teachers' Retirement Law requires individual account statements to be provided to each active and inactive member at least annually.

Major Fiscal Year 2011/2012 Milestones

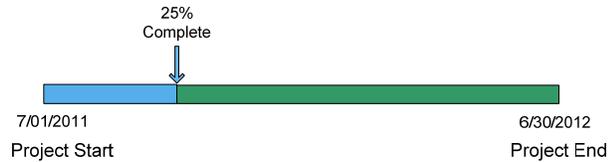
**2011/2012 Project Budget
\$89 Thousand**



**Total Project Budget
\$89 Thousand**



Project Schedule Status Timeline



Anti-Spiking Discovery

The Anti-spiking discovery will explore system-wide solutions that will allow CalSTRS to systematically and consistently identify and prevent benefit spiking.

Board Strategic Fit

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective D: **Identify and eliminate internal and external data integrity problems**

Period Ending September 30, 2011:

- Completed Discovery Results document and presented to Enterprise Program Investment Council (EPIC).
- Transitioned recommendations to program areas for implementation.
- Conducted lessons learned.

Planned Deliverables by December 31, 2011:

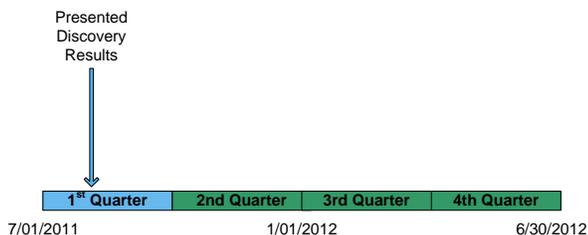
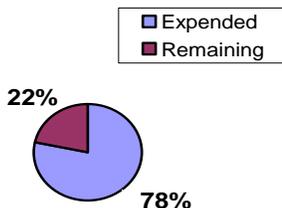
- Project is complete.

Total Project Cost: Project was completed under budget.

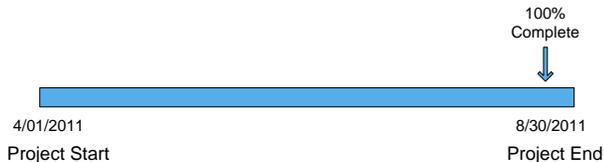
Schedule and Scope: Project was completed within the approved scope and schedule.

Major Fiscal Year 2011/2012 Milestones

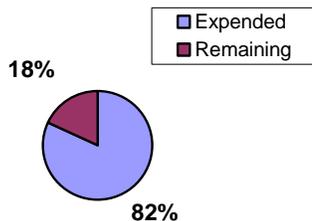
2011/2012 Project Budget
\$11 Thousand



Project Schedule Status Timeline



Total Project Budget
\$32 Thousand



Board Elections

The Board Election project will facilitate, coordinate and conduct the CalSTRS 2012 Board Election as required under the Teachers' Retirement Law. The elected candidates will serve a four-year term beginning January 1, 2012.

Period Ending September 30, 2011:

- Delivered production address files to election services vendor.
- Validated and proofed printed ballots and envelopes.
- Compiled, formatted and delivered Candidate Statements to vendor.
- Received and approved telephone and internet draft ballots.
- Completed testing of telephone and internet voting process.
- Submitted address production files to election services vendor.

Key Operational Initiative

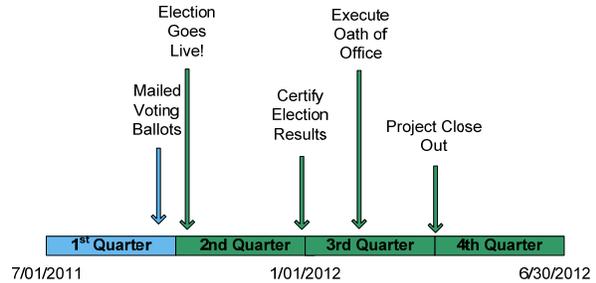
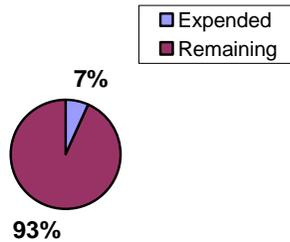
Teachers' Retirement law requires CalSTRS to conduct a Board Election every four years.

Planned Deliverables by December 31, 2011:

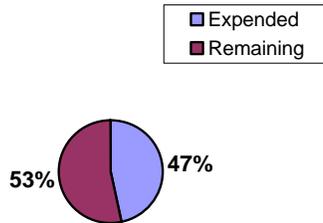
- Mail voting ballots to eligible members.
- Conduct Board Election process.
- Activate telephone and internet voting systems.
- Certify election results.

Major Fiscal Year 2011/2012 Milestones

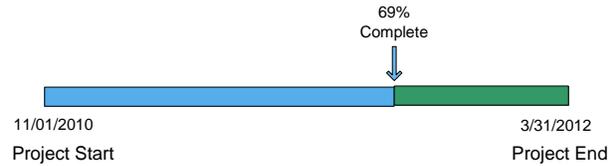
**2011/2012 Project Budget
\$27 Thousand**



**Total Project Budget
\$48 Thousand**



Project Schedule Status Timeline



BusinessRenew Requirements Management

The BusinessRenew Requirements Management project will develop the strategy for managing CalSTRS business and system requirements. Upon approval, a second phase of the project will be initiated to implement the Plan.

Board Strategic Fit

Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective D: **Identify and eliminate internal and external data integrity problems.**

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective F: **Identify and improve the efficiency of CalSTRS business.**

Period Ending September 30, 2011:

- Completed draft Project Charter and obtained core team resources.
- Initiated drafting the Requirements Management Plan with a sub team until resources become available.
- Delayed project initiation until all core team resources are available.

Planned Deliverables by December 31, 2011:

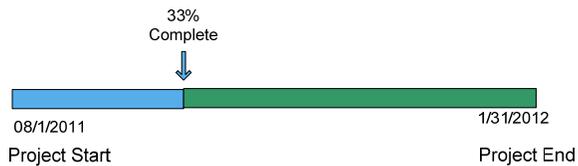
- Obtain resources and begin project.
- Finalize Project Charter.
- Complete Draft Requirements Management Plan for review.

Critical Warning: Project schedule is in critical warning status due to lack of available resources.

Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



BusinessRenew Corporate Accounting & Resource Management

The Renew Corporate Accounting and Resource Management (CARM) project will improve financial reporting, corporate accounting, budgeting, procurement and contract management by implementing policies and technology systems that include automated internal controls to reduce financial and operational risks.

Board Strategic Fit

Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective D: **Identify and eliminate internal and external data integrity problems.**

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective F: **Identify and improve the efficiency of CalSTRS business.**

Period Ending September 30, 2011:

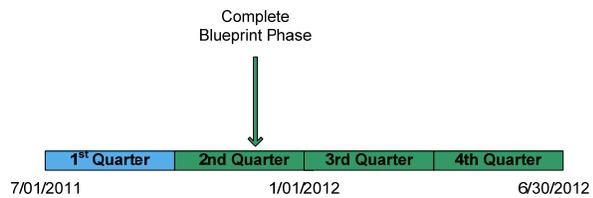
- Held formal Project Kick-Off and Blueprint Training sessions.
- Completed Project Planning Phase.
- Completed SAP sandbox environment to support demonstrations during design phase.
- Completed 80% of draft solution design (Blueprint) phase.
- Submitted fiscal year 2012-2013 Budget Change Proposal request for ongoing production maintenance services.

Planned Deliverables by December 31, 2011:

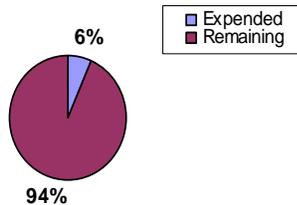
- Complete solution design (Blueprint) phase.
- Hold walkthroughs of functionality for end-user stakeholder groups.
- Approve system design (Blueprint) document.
- Approve technical planning documents (Data Conversion Plan, System Security Plan, System Landscape Strategy).
- Approve Change Management Plan and commence Change Management activities.
- Commence Realization (build) phase.
- Draft Request For Proposal (RFP) for Application Maintenance and Operations Services.

Note: Project is funded from FY2011/2012 Operating Budget one time funds and contingency funds and will utilize Enterprise Program Investment Council (EPIC) funding for Fiscal Year 2012/2013 only.

Major Fiscal Year 2011/2012 Milestones



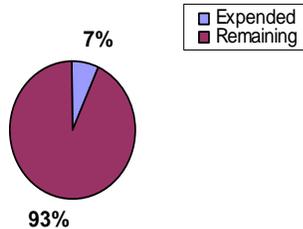
2011/2012 Project Budget \$15 Million



Project Schedule Status Timeline



Total Project Budget \$19 Million



BusinessRenew Pension Solution Discovery

The Renew Pension Discovery will acquire the services of a Pension System Expert to assist CalSTRS in planning for a new pension solution, refining estimates for costs, schedule and resources.

Board Strategic Fit

Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective D: Identify and eliminate internal and external data integrity problems.

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective F: Identify and improve the efficiency of CalSTRS business.

Period Ending September 30, 2011:

- Obtained board approval for pension system expert contract award.
- Executed contract and on-boarded the pension system expert.
- Finalized the detailed project schedule and staffing plan.
- Began discussions with the pension system expert and CalSTRS' subject matter experts regarding the pension accounting functional boundary issue.

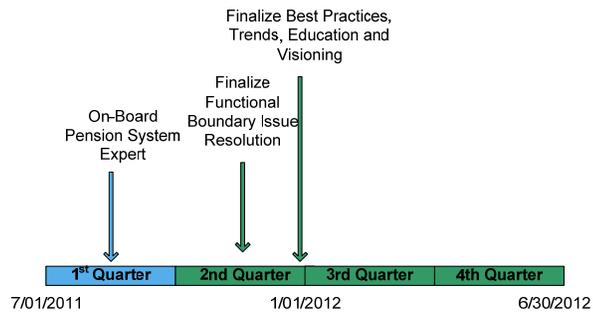
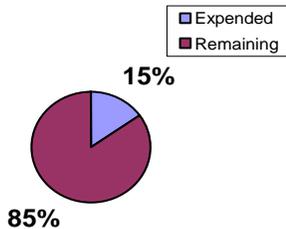
Planned Deliverables by December 31, 2011:

- Gain Enterprise Program Investment Council (EPIC) approval for the change request to extend the project end-date to June 30, 2012 and increase the budget by \$85,000 for Business Lead backfill and Project Management funds to accommodate the five month delay.
- Finalize Pension Administration Best Practices and Trends.
- Conduct Pension Administration Visioning Sessions with Executives and Directors.
- Finalize the Functional Boundary Issue Resolution Document.

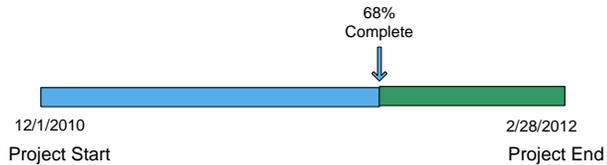
🚩 Schedule Warning: Project is behind schedule due to the delay in releasing the Request for Proposal for a pension expert.

Major Fiscal Year 2011/2012 Milestones

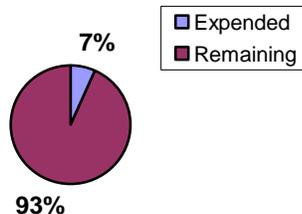
2011/2012 Project Budget
\$1.6 Million



Project Schedule Status Timeline



Total Project Budget
\$5.1 Million



BusinessRenew Project Support

The Renew Project Support will provide project support for all Renew project efforts including independent project oversight, legal services and cultural change and communications management support.

Period Ending September 30, 2011:

- Awarded contract for BusinessRenew Independent Project Oversight to Grant Thornton LLP.
- Finalized BusinessRenew governance model.
- Hired BusinessRenew Communications support staff.

Planned Deliverables by December 31, 2011:

- Transition oversight scope and budget to a separate effort entitled BusinessRenew – Independent Project Oversight.
- Finalize BusinessRenew Communications and Change Management plans.
- Develop initial baseline assessment report for large BusinessRenew projects (Corporate Accounting & Resource Management, Pension Solution Discovery) and BusinessRenew governance.

Board Strategic Fit

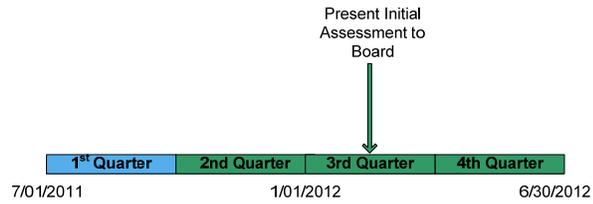
Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective D: *Identify and eliminate internal and external data integrity problems.*

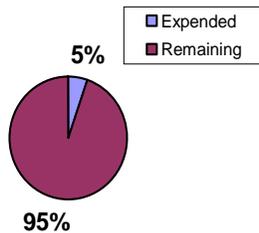
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective F: *Identify and improve the efficiency of CalSTRS business.*

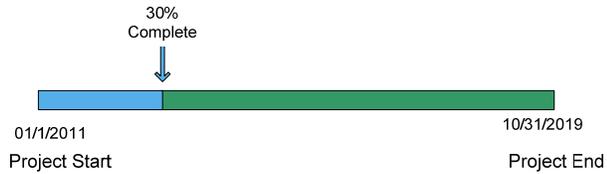
Major Fiscal Year 2011/2012 Milestones



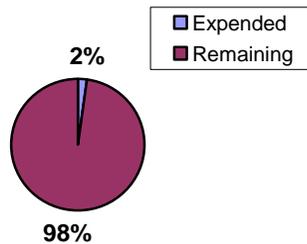
2011/2012 Project Budget
\$2 Million



Project Schedule Status Timeline



Total Project Budget
\$8 Million



Cost Effectiveness Measurement

CalSTRS initiated the Cost Effectiveness Measurement (CEM) Defined Benefit Administration Survey project to coordinate and facilitate all efforts in response to the Defined Benefit Administration annual survey being conducted by CEM, Inc.

Board Strategic Fit

Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective C: Evaluate customer service using benchmark and best practices research.

Period Ending September 30, 2011:

- Scheduled 2009/2010 CEM Inc. presentation for CalSTRS Leadership Team and staff.
- Canceled Project for 2010/2011 fiscal year and replaced with a less complex survey conducted by the program area.

Planned Deliverables by December 31, 2011:

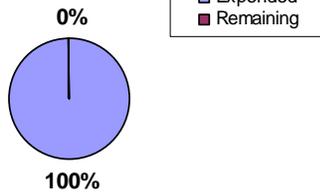
- Present 2009/2010 CEM Inc. results to CalSTRS Leadership Team and staff.
- Project is complete.

Total Project Cost: Project returned \$31,500 to the Enterprise Program Investment Council (EPIC).

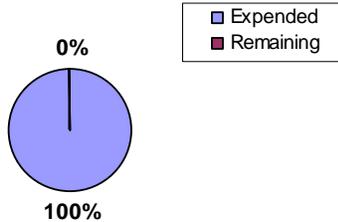
Schedule and Scope: Project was terminated prior to the scheduled end date.

Major Fiscal Year 2011/2012 Milestones

2011/2012 Project Budget
\$17 Hundred



Total Project Budget
\$17 Hundred



Investment Accounting

The Investment Accounting Project will enhance the current accounting procedures and processes as they relate to accounting for CalSTRS' investment portfolio.

Board Strategic Fit

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective E: **Enhance the scope and quality of internal controls, internal audits and external audits.**

Period Ending September 30, 2011:

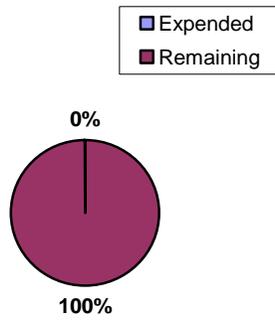
- Completed the majority of the 2010-11 fair value activities.
- Finalized complex securities memoranda for applicable investments.
- Completed operation of quarterly and annual oversight tools on June 30, 2011 year end.
- Added 82 new accounts and changed 17 existing accounts on CalSTRS chart of accounts to facilitate long term solution to general ledger mapping issues.

Planned Deliverables by December 31, 2011:

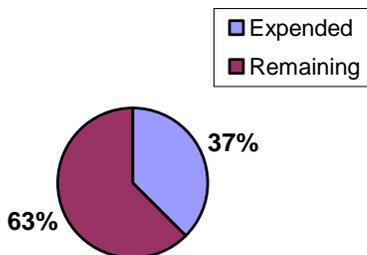
- Transition operation of the oversight tools to CalSTRS Investment Accounting staff.
- Finalize Policies and Procedures related to Investment Accounting.
- Finalize Risk Assessment tool for Investment Accounting.
- Complete user testing of implementation of recommendations for long term solutions to general ledger mapping issues and expand chart of accounts for investments and investment activities.
- Complete project close-out activities.

Note: The project was initiated in October 2008, with a total of \$1,250,000 in contingency funds divided equally between fiscal years 2008/2009 and 2009/2010, and received Enterprise Program Investment Council (EPIC) funding beginning in January 2010. All of the 2009/2010 contingency funds and \$859,964 of the 2009/2010 EPIC funds have been expended.

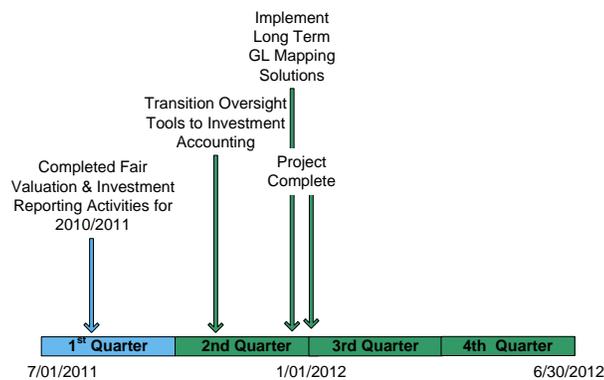
2011/2012 Project Budget
\$827 Thousand



Total Project Budget
\$2.8 Million



Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



myCalSTRS Online Services for Teachers (MOST)

The MOST project enhances member online services by updating the secure access and providing a variety of new online services including the ability to complete the retirement application and register for direct deposit online.

Board Strategic Fit

Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

Objective A: **Develop new ways to effectively communicate with different segments of the membership to enhance their understanding of CalSTRS benefits.**

Period Ending September 30, 2011:

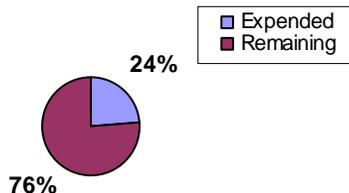
- Conducted Lessons Learned sessions.
- Since July 2010:
 - Registered 154,390 members through online and alternate registration processes
 - Enrolled 5,580 members for direct deposit; updated 24,379 member addresses, and 10,447 members' tax withholding information
 - Received 10,521 on-line Death Beneficiary forms
 - Received 1,255 on-line Verification of Benefits requests
 - Completed 702 on-line Service Credit forms
 - Received 253 Service Retirement Applications, 83 Pre-Retirement Applications and 124 Refund Applications online.

Planned Deliverables by December 31, 2011:

- Complete project close-out report.

Note: The project was initiated in January 2009 with fiscal year 2008/2009 contingency funds of \$858,000 and fiscal year 2009/2010 contingency funds of \$1,480,000 and received Enterprise Program Investment Council (EPIC) funding beginning in November 2009. A total of \$1,333,984 in contingency funds has been expended.

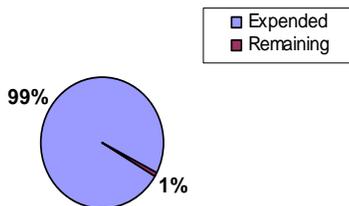
2011/2012 Project Budget
\$19 Thousand



Major Fiscal Year 2011/2012 Milestones



Total Project Budget
\$1.8 Million



Project Schedule Status Timeline



Penalties and Interest

The Penalties and Interest project will implement SAP, a commercial off-the-shelf (COTS) solution, to automate the calculation, billing, monitoring, collection and dispute process of penalties and interest assessed to Employers for late remittances, late reporting and late adjustments of contributions.

Board Strategic Fit

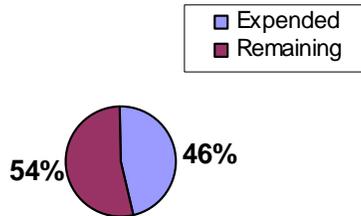
Goal 1: Raise the quality in the delivery of benefits, products and services to best in class.

Objective D: Identify and eliminate internal and external data integrity problems.

Period Ending September 30, 2011:

- Conducted system prototype demonstration with the employer pilot team.
- Created and provided system training to both internal staff and employers.
- Completed system performance testing.
- Completed the final two phase of testing (Integration Test Cycle 2 and User Acceptance Testing).
- Implemented the automated system to support the refund and collection of contributions and the collection and assessment of penalties and interest and activated the contribution underpayment collection and overpayment refund process.
- Conducted lessons learned sessions.
- Requested and received Enterprise Program Investment Council (EPIC) approval to increase the schedule and establish a fiscal year 2012/2013 budget to address the regulations version change and activities to support activating the full system functionality with the July 2012 Regulations start date.
- Requested and received Enterprise Program Investment Council (EPIC) approval to increase the fiscal year 2011/2012 budget to align the project budget with the vendor contract encumbrance.

2011/2012 Project Budget
\$4.5 Million



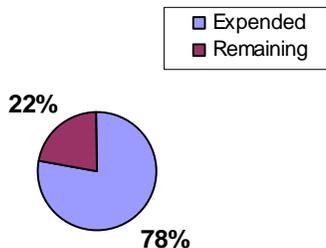
Planned Deliverables by December 31, 2011:

- Complete lessons learned report and close-out activities related to the automation portion of the project.
- Complete functional specification updates and use cases for in-house system changes to fully enforce required edits prior to the regulations start date.
- Develop business requirements matrix for Secure Employer Web site and the corporate database.
- Develop requirements for regulations version change.
- Continue working with employers in preparing for the July 2012 Regulations start date.

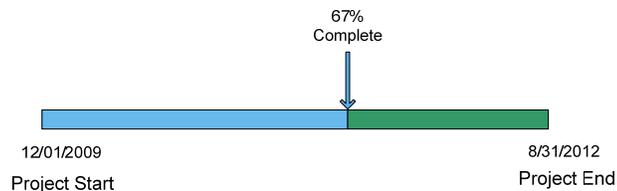
Major Fiscal Year 2011/2012 Milestones



Total Project Budget
\$11.2 Million



Project Schedule Status Timeline



Pension Accounting Initiative

The Pension Accounting Initiative will improve internal controls by addressing gaps between current and best practices in accounting policy, planning, treatment, chart of accounts, analysis, availability of financial information, use of the general ledger, communication of fiscal impacts, and training for pension administration business events.

Period Ending September 30, 2011:

- Completed the annual assessment of the accounting treatment implementation efforts designed to strengthen internal controls over financial reporting.
- Completed the Accounting Classification Specifications Proposal Request Packet and submitted to the State Human Resources control agencies for review.

Planned Deliverables by December 31, 2011:

- Work with the State Human Resources control agencies to finalize the Accounting Classification Specifications Proposal Request.
- Complete project closeout report.

Board Strategic Fit

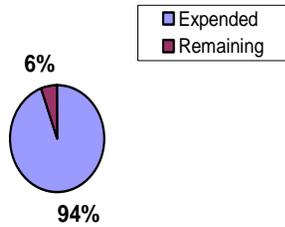
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective E: **Enhance the scope and quality of internal controls, internal audits and external audits.**

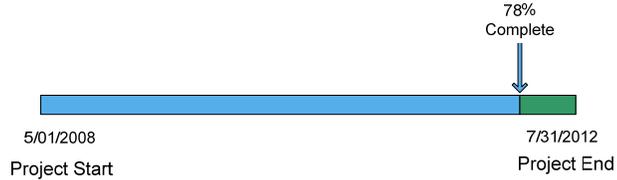
Major Fiscal Year 2011/2012 Milestones



Total Project Budget \$6.4 Million



Project Schedule Status Timeline



Priority Management-Project Portfolio Management (PPM) Tool

The Priority Management - Project Portfolio Management (PPM) Tool will procure and implement a new tool for effective project and resource data collection, management and reporting.

Board Strategic Fit

Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective F- Identify and improve the efficiency of CalSTRS business.

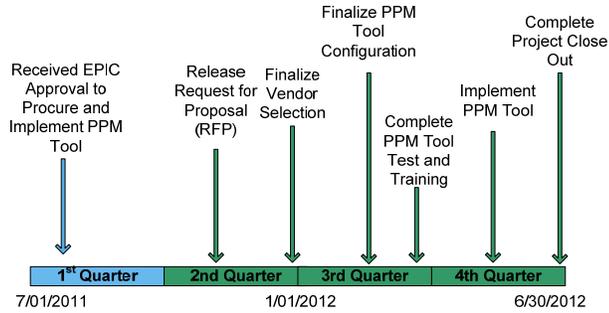
Period Ending September 30, 2011:

- Received Enterprise Program Investment Council (EPIC) approval to procure and implement a Project Portfolio Management (PPM) Tool.
- Completed first draft of Project Portfolio Management Tool Request for Proposal.
- Initiated interview process to hire new student assistant.

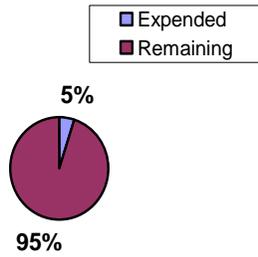
Planned Deliverables by December 31, 2011:

- Release the Request for Proposal for a Project Portfolio Management Tool.
- Conduct vendor demonstrations and perform key reference checks.
- Complete vendor evaluation and selection process.
- Hire and onboard a new student assistant.

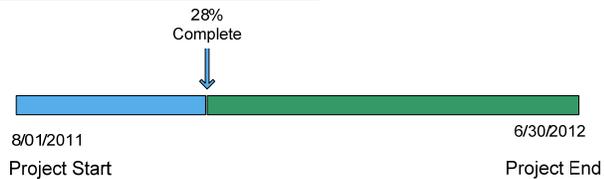
Major Fiscal Year 2010/2011 Milestones



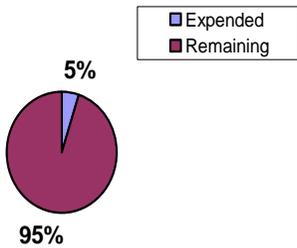
2011/2012 Project Budget
\$396 Thousand



Project Schedule Status Timeline



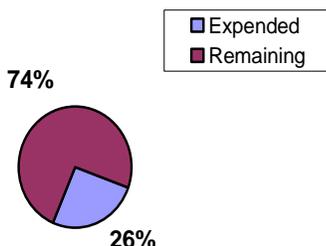
Total Project Budget
\$396 Thousand



Project Management Office Program

The Project Management Office provides oversight and management of enterprise wide Enterprise Program Investment Council (EPIC) projects. The Project Management Office utilizes Project Management and System Development Life Cycle methodologies to manage projects. The Project Management Office also provides project resources and project management consulting to the CalSTRS organization.

**2011/2012 Project Budget
\$741 Thousand**



Period Ending September 30, 2011:

- Provided direction for one project (Penalties and Interest) requesting a schedule and budget change.
- Provided direction for two new requests for discovery (BusinessRenew: Data Preparation and BusinessRenew: Centralized Requirements Repository).
- Provided direction for one new project request (Priority Management – Project Portfolio Management Tool).
- Provided direction for one project (BusinessRenew: Corporate Accounting and Resource Management) requesting a schedule realignment.
- Provided direction for one discovery (Anti-Spiking) presenting recommendations to the Enterprise Program Investment Council (EPIC).
- Provided direction for one support effort (BusinessRenew: Project Support) requesting to remove the independent project oversight scope to a separate effort (BusinessRenew: Governance and Independent Project Oversight) with a budget and schedule.
- Provided project management support for the two efforts (Hosted Contact Center and Omnibus Bill discovery).
- Provided oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.
- Continued updating the CalSTRS project management methodology to align with updated CalSTRS methodologies.
- Finalized and provide Enterprise Program Investment Council (EPIC) with the results of one post implementation evaluation report (PIER) for the Accounting Reengineering project.
- Obtained final approval of Priority Management assessment and scoring model.

Planned Deliverables by December 31, 2011:

- Provide direction for business areas developing business cases; projects presenting discovery results recommendations; and projects requesting a schedule extension, budget increase or scope modification.
- Provide direction for two new requests for discovery (BusinessRenew: Data Preparation and Scheduling System).
- Provide direction for one discovery effort (BusinessRenew: Pension) requesting a schedule and budget change.
- Provide direction for one new project request (Calstrs.com Redesign).
- Provide project management support for Omnibus Bill discovery.
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.
- Draft two post implementation evaluation reports (PIERs) on the Data Integrity and Additional Earnings and Annuity Credit projects.
- Initiate the Priority Management process and support the process rollout.
- Continue updating the CalSTRS project management methodology to align with updated CalSTRS methodologies.
- Provide a Project Express workshop series to CalSTRS staff on project management processes and templates.