
CALSTRS

Enterprise Projects Fiscal Year 2011/2012 Third Quarter Report

Enterprise Projects

Fiscal Year 2011/2012 – Third 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

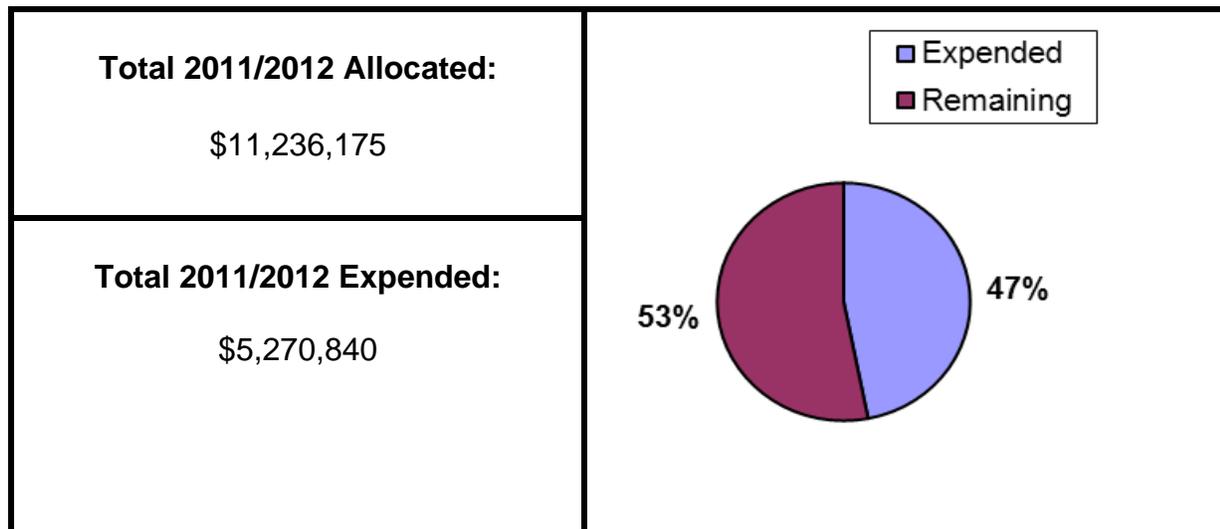
Ed Derman
Deputy Chief Executive Officer
Plan Design and Communication

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 March 31, 2012



Enterprise Projects

Fiscal Year 2011/2012 – Third Quarter

Project Name	Duration	Project Total ¹	2011/2012 Budget	2011/2012 Expended ²	Schedule	Budget
Actuarial Valuation	Apr 08 – Jun 12	\$1,829,847	\$130,000	\$22,300	◆ ³	◆ ³
Annual Update	Jul 11 – Jun 12	\$89,050	\$89,050	\$58,016	●	●
Anti-Spiking Discovery	Apr 11 – Aug 11	\$28,490	\$11,250	\$8,800	☺	☺
Board Elections	Nov 10 – Mar 12	\$47,135	\$26,880	\$3,350	☺	☺
BusinessRenew						
Corporate Accounting & Resource Management ⁴	Jan 11 – Aug 13	\$19,712,318 ⁴	\$15,768,713 ⁴	\$4,417,586 ⁴	⚠ ⁵	⚠ ⁶
Data Preparation ⁶	Nov 11 – Nov 12	\$2,710,455	\$1,215,236	\$436,067	⚠ ⁷	●
Independent Project Oversight	Sep 11 – Oct 19	\$6,100,000	\$800,000	\$251,761	●	●
Pension Solution	Dec 10 – Jun 12	\$5,189,487 ⁸	\$1,656,262	\$706,981	●	●
Project Support	Jan 11 – Jun 13	\$1,934,700	\$1,214,000	\$172,575	●	●
Requirements Management	Aug 11 – Jun 12	\$0 ⁹	\$0 ⁹	\$0 ⁹	●	N/A
CalSTRS.com Redesign	Nov 11 – Apr 12	\$19,220	\$19,220	\$15,350	⚠ ¹⁰	●
Cost Effectiveness Measurement	Jul 11 – Sep 11	\$1,700	\$1,700	\$1,700	☺	☺
Investment Accounting ¹¹	Oct 08 – Dec 11	\$2,704,000	\$827,000	\$45,249	☺	☺
myCalSTRS Online Services for Teachers ¹¹	Jan 09 – Dec 11	\$1,838,151	\$19,080	\$19,076	☺	☺
Omnibus Bill	Oct 11 – Nov 12	\$354,530	\$286,022	\$43,442	●	●
Penalties and Interest	Dec 09 – Aug 12	\$11,268,923	\$4,524,153	\$3,020,791	●	●
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	\$78,380	⚠ ¹²	●
SchedulePlus	Dec 11 – Jun 12	\$30,000	\$30,000	\$14,350	●	●
Project Management Office Program	Ongoing	\$740,440	\$740,440	\$533,621	N/A	●
Project Risk Reserve	Ongoing	\$1,000,000	\$1,000,000	\$600,000	N/A	●
Total Enterprise Projects' 2011/2012 Budget:		Total 2011/2012 Allocated:		Total 2011/2012 Expended:		
\$20 million		\$11,236,175		\$5,270,840		
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 need to procure vendor to prepare final deliverable

⁴ BusinessRenew Corporate Accounting & Resource Management – \$15.5 million funded through Board and contingency funds and is excluded from the Enterprise Projects' stated Budget, Allocated and Expended totals information. Received EPIC funds of \$600,000 for fiscal year 2011/2012 and \$3.3 million for fiscal year 2012/2013

⁵ BusinessRenew Corporate Accounting & Resource Management - schedule warning due to delay in the blueprint (design) phase completion

⁶ BusinessRenew Corporate Accounting & Resource Management – budget warning due to needing funds to support additional project management services

⁷ BusinessRenew Data Preparation –schedule delay due to procurement process longer than initially estimated

⁸ BusinessRenew Pension Solution - amount includes funds for project phases beyond the defined discovery phase

⁹ BusinessRenew Requirements Management – this project is utilizing internal resources only

¹⁰ CalSTRS.com Redesign – schedule delay due to procurement process longer than initially estimated

¹¹ Investment Accounting & myCalSTRS Online Services for Teachers projects initiated with contingency funding and later received EPIC funding. The amount displayed above reflects EPIC funding only.

¹² Priority Management Portfolio Management Tool –schedule delay due to procurement process longer than initially estimated

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 March 31, 2012:

- Initiated procurement process for vendor service to prepare the Detailed Internal Procedures Report.
- Completed analysis of alternative solutions for completing the Detailed Internal Procedures Report.

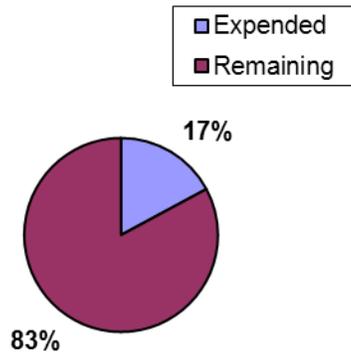
Planned Deliverables by June 30, 2012:

- Request Enterprise Program Investment Council (EPIC) approval to proceed with the team's recommendations for completing the Detailed Internal Procedure Report and project close-out activities.

◆ **Critical Warning:** Project schedule and budget in critical status due to unavailability of contractor and the need to procure a new vendor to prepare final deliverable.

Major Fiscal Year 2011/2012 Milestones

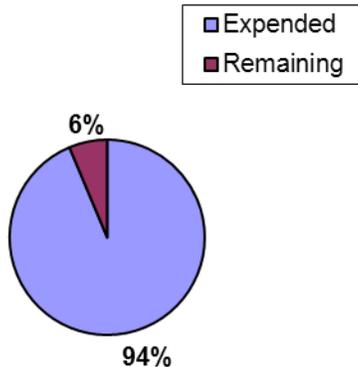
2011/2012 Project Budget
\$130 Thousand



Project Schedule Status Timeline



Total Project Budget
\$1.8 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 March 31, 2012:

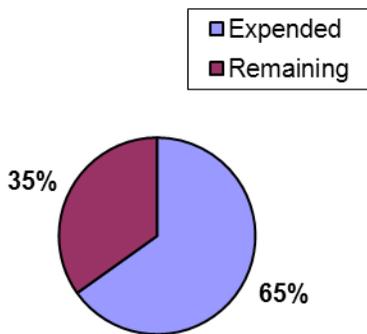
- Gathered data on 2011 Retirement Progress Reports Customer Satisfaction Survey.
- Completed the 2010/2011 Annual Update project close-out report.
- Initiated the 2011/2012 Project Kick-off.
- Defined the 2011/2012 Retirement Progress Report enhancements.
- Commenced developing the requirements and design specifications for the 2011/2012 Retirement Progress Reports.

Planned Deliverables by June 30, 2012:

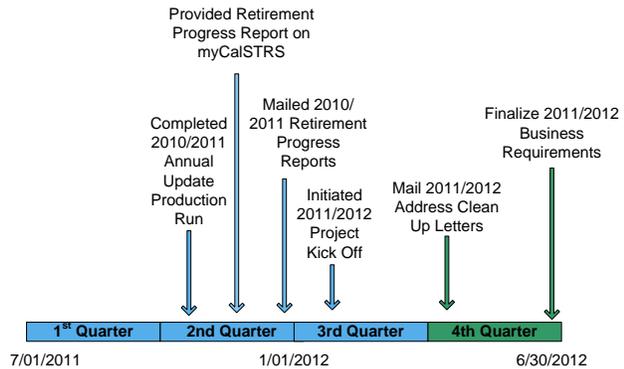
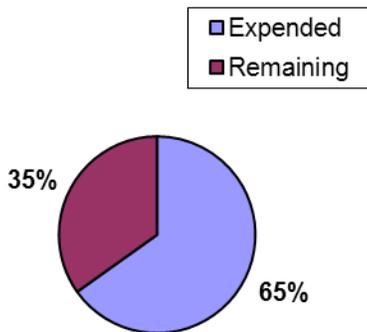
- Complete business requirements for the 2011/2012 Retirement Progress Report enhancements.
- Create and mail 19,000 letters for member confirmation of a new US Postal Service provided address.

Major Fiscal Year 2011/2012 Milestones

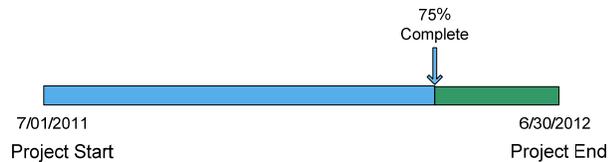
2011/2012 Project Budget
\$89 Thousand



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.

Period Ending March 31, 2012:

- Project is complete.

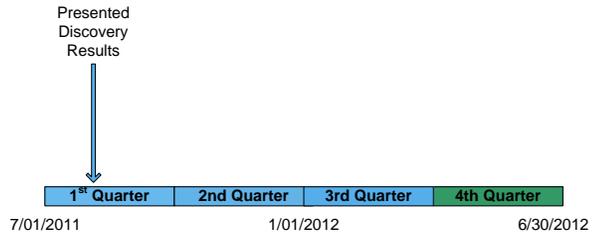
Planned Deliverables by June 30, 2012:

- Project is complete.

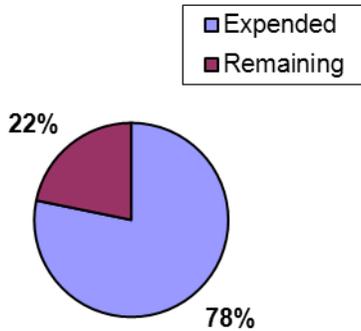
Total Project Cost: Project was completed under budget.

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

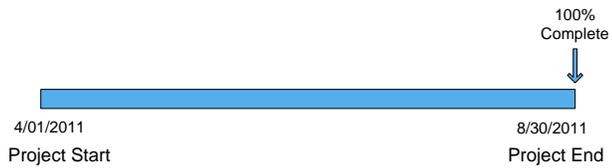
Major Fiscal Year 2011/2012 Milestones



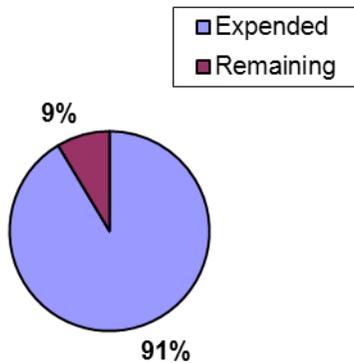
2011/2012 Project Budget
\$11 Thousand



Project Schedule Status Timeline



Total Project Budget
\$28 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 March 31, 2012:

- Executed new board members' oath of office.
- Conducted lessons learned sessions.
- Continue to finalize project close-out report.

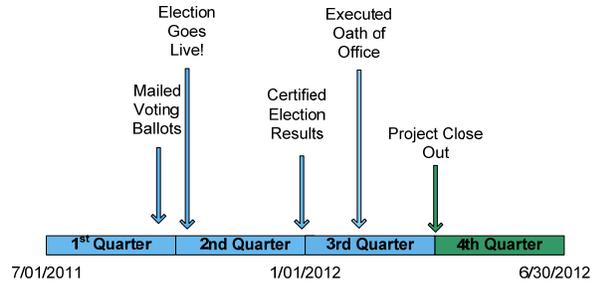
Planned Deliverables by June 30, 2012:

- Finalize project close-out report.

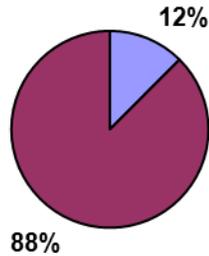
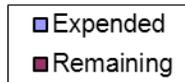
Total Project Cost: Project was completed under budget by \$23,530.

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

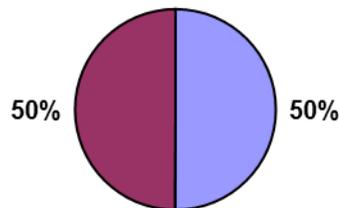
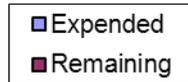
Major Fiscal Year 2011/2012 Milestones



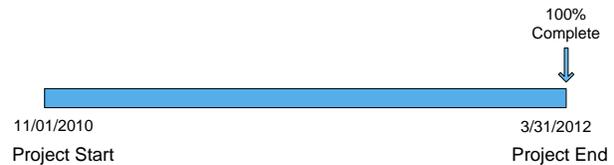
2011/2012 Project Budget \$27 Thousand



Total Project Budget \$47 Thousand



Project Schedule Status Timeline



BusinessRenew Corporate Accounting & Resource Management

The BusinessRenew 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.

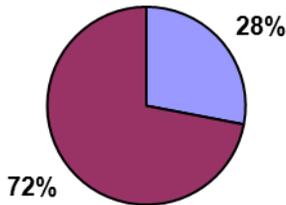
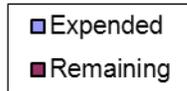
Period Ending March 31, 2012:

- Approved Blueprint document which defines the entire solution from a business perspective.
- Completed detailed schedule for Realization (configuration, development and testing) Phase.
- Commenced configuration of 55% of the business processes.
- Completed functional design of approximately 17% of custom development objects.
- Received \$600,000 in Enterprise Program Investment Council (EPIC) funding to purchase necessary hardware.

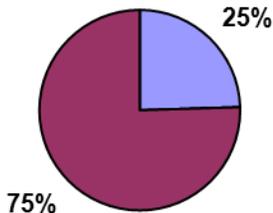
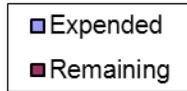
Planned Deliverables by June 30, 2012:

- Complete 90% of the SAP solution configuration.
- Complete Functional and Technical Specifications for all custom objects.
- Complete Unit Testing for all Priority 1 and 2 custom objects.
- Complete Integration Test preparation (including the Unit Test Plan, Integration Test Plan and Scripts).
- Commence Integration Testing Cycle 1.
- Complete organizational change management documents for (1) Change Network Development (2) Change Impact Analysis and Action Plan.
- Complete Training Plan.
- Request Enterprise Program Investment Council (EPIC) approval to increase the project budget by \$749,680 for additional project management services and to establish a project risk reserve.
- Amend implementation vendor contract to include application maintenance and support services.

**2011/2012 Project Budget
\$15.8 Million**



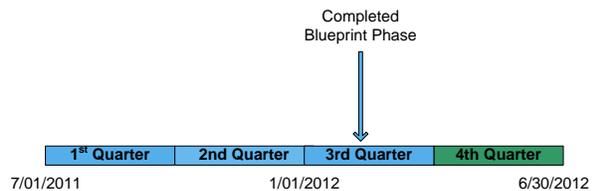
**Total Project Budget
\$19.4 Million**



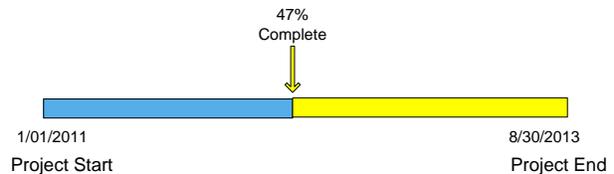
Schedule and Budget Warning: Project is behind schedule due to the delay in blueprint phase completion and scaling the project team. The project management team plans to re-evaluate the schedule after productivity measures for the fully staffed team can be captured (early May). The project identified the need for additional project management services and will be requesting EPIC approval for a budget increase to support these services in addition to establishing a project risk reserve.

Note: Project is funded from FY2011/2012 Operating Budget one time funds and contingency funds and is utilizing Enterprise Program Investment Council (EPIC) funding for supplementing the base budget.

Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



**BusinessRenew
Data
Preparation**

The Renew Data Preparation project will acquire the services of a Data Analysis Services vendor to assist in analyzing CalSTRS pension data and developing a plan for preparing the data for conversion to a new pension solution.

Period Ending March 31, 2012:

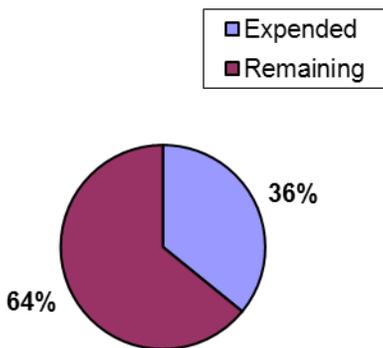
- Released the Request for Proposal for a data analysis services vendor.
- Developed the Complete Account Review and Evaluation (CARE) team's progress report for presentation to the Enterprise Program Investment Council (EPIC).

Planned Deliverables by June 30, 2012:

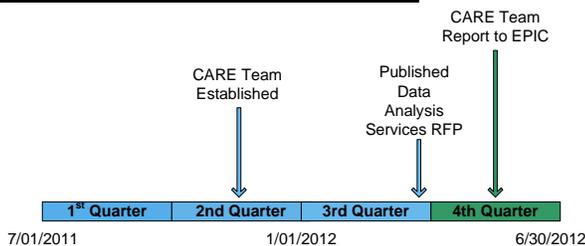
- Release a procurement document for the development of a plan for Enterprise Data Management with an initial focus on the Pension Solution needs.
- Deliver the Complete Account Review and Evaluation (CARE) team's progress report to the Enterprise Program Investment Council (EPIC).
- Conduct the Data Analysis Services Request for Proposal vendor response evaluations.
- Request a schedule change to accommodate the extended data analysis services procurement process.

Schedule Warning: The project is behind schedule due to the delay in the publication of the Data Analysis Services RFP. The project team will return to EPIC in June with a scope, schedule and budget change request. The procurement document for Data Analysis Services was published March 30, 2012.

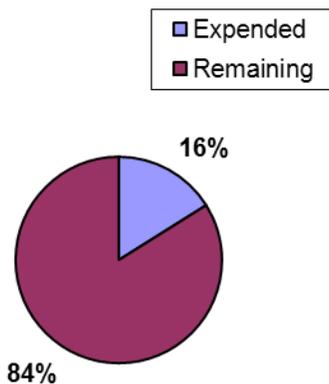
2011/2012 Project Budget
\$1.2 Million



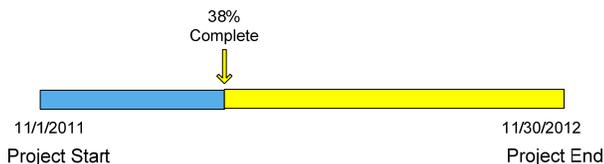
Major Fiscal Year 2011/2012 Milestones



Total Project Budget
\$2.7 Million



Project Schedule Status Timeline



BusinessRenew Independent Project Oversight

The BusinessRenew Independent Project Oversight will deliver an independent, un-biased assessment of significant BusinessRenew projects progress, outcomes, project and risk management, including but not limited to compliance with established governance and project management processes and best practices.

Period Ending March 31, 2012:

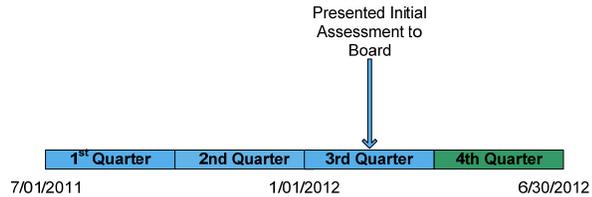
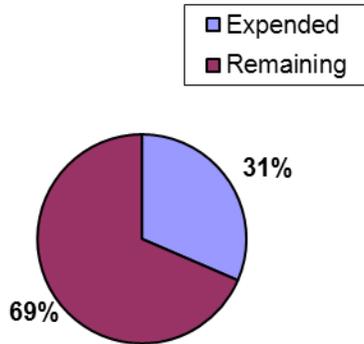
- Completed initial baseline assessment reports for large BusinessRenew projects (Corporate Accounting and Resource Management and Pension Solution).
- Presented initial assessment findings at the February board meeting.

Planned Deliverables by June 30, 2012:

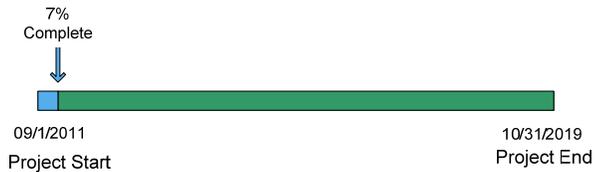
- Develop monthly assessment reports for large BusinessRenew projects (Corporate Accounting and Resource Management, Pension Solution, and Data Preparation.)
- Present board updates at the April and June board meetings.
- Provide feedback on BusinessRenew governance improvements.
- Request Enterprise Program Investment Council approval to increase the budget to include additional BusinessRenew efforts in the monthly assessments.

Major Fiscal Year 2011/2012 Milestones

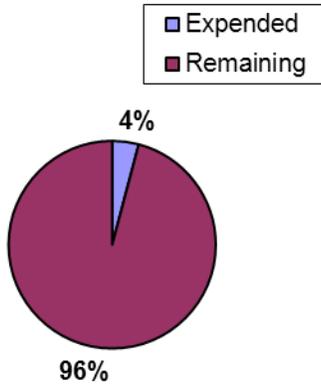
2011/2012 Project Budget
\$800 Thousand



Project Schedule Status Timeline



Total Project Budget
\$6.1 Million



BusinessRenew Pension Solution

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.

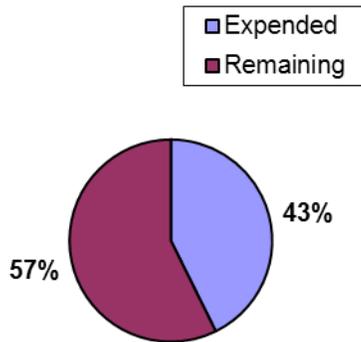
Period Ending March 31, 2012:

- Finalized and gained approval of the Pension Administration Best Practices and Trends report.
- Conducted Pension Administration education sessions with CalSTRS high level management.
- Completed the business area working sessions to identify and document current Pension Administration inconsistent business practices.

Planned Deliverables by June 30, 2012:

- Conduct the "Vision of the Future" education session with CalSTRS executive staff.
- Finalize the Inconsistent Business Practices document.
- Finalize the Discovery Results document.
- Gain Enterprise Program Investment Council (EPIC) approval to move forward with the pension solution business requirements phase of the Pension Solution effort.

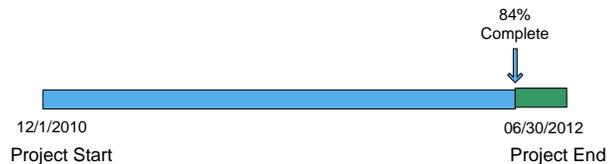
2011/2012 Project Budget
\$1.7 Million



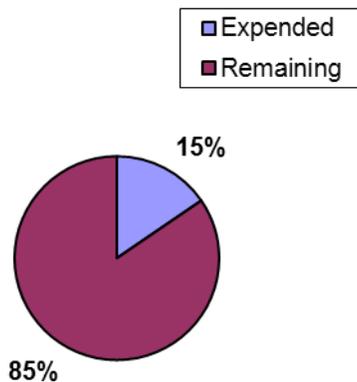
Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



Total Project Budget
\$5.2 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 March 31, 2012:

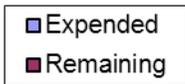
- Provided communications support for large BusinessRenew projects (Corporate Accounting and Resource Management, Pension Solution and Data Preparation.)
- Finalized BusinessRenew communications plan.
- Initiated CalSTRS intranet sites for BusinessRenew, Pension Solution and Data Preparation.
- Provided legal support for the maintenance and support agreement for the Corporate Accounting and Resource Management Project.

Planned Deliverables by June 30, 2012:

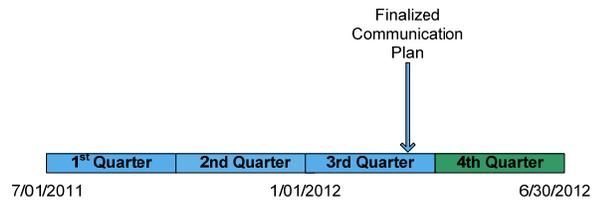
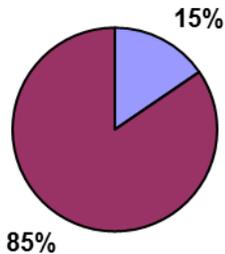
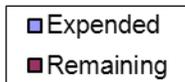
- Provide on-going communications support for Pension Solution and Data Preparation discovery efforts.

Major Fiscal Year 2011/2012 Milestones

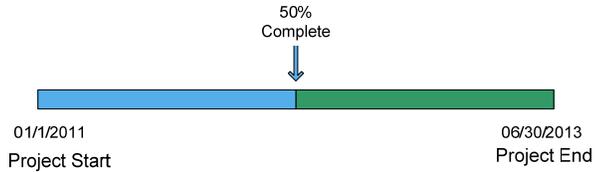
**2011/2012 Project Budget
\$1.2 Million**



**Total Project Budget
\$1.9 Million**



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
--------------	---------	-----------------

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.

Period Ending March 31, 2012:

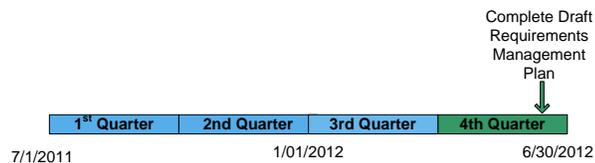
- Requested and received Enterprise Program Investment Council (EPIC) approval to extend the discovery through June 30, 2012.
- Obtained additional business analyst resources.
- Identified project tasks identified and updated schedule.
- Finalized requirements for a tool to assist with Requirements Management.

Planned Deliverables by June 30, 2012:

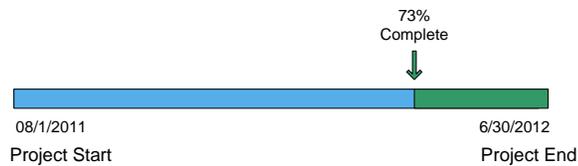
- Complete Requirements Management Plan.
- Develop recommendation for a Requirements Management tool.
- Develop a draft structure for storing the managing the Pension Solution discovery requirements.
- Develop recommendations regarding existing requirements and a new tool.
- Request Enterprise Program Investment Council (EPIC) approval of the Discovery results and recommendations for next steps.

Major Fiscal Year 2011/2012 Milestones

2011/2012 Project Budget
No Budget



Project Schedule Status Timeline



CalSTRS.com Redesign

The CalSTRS.com Redesign Discovery will explore options for a CalSTRS.com website redesign, and release a request for proposal to seek vendor website redesign services.

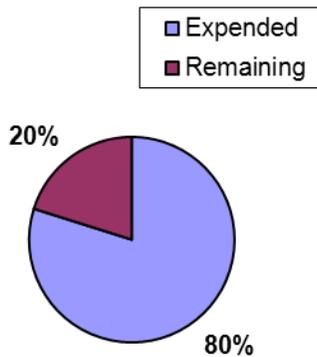
Period Ending March 31, 2012:

- Completed and released the Request for Proposal for website redesign vendor services.
- Returned to the Enterprise Program Investment Council (EPIC) to extend the discovery schedule by two months to April 2012.

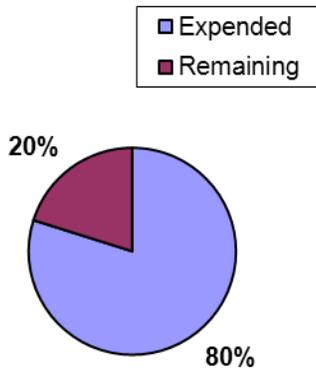
Planned Deliverables by June 30, 2012:

- Complete vendor selection process.
- Complete discovery results and request Enterprise Program Investment Council (EPIC) approval to proceed with the redesign of the CalSTRS.com website.
- Execute the contract for website redesign vendor services.

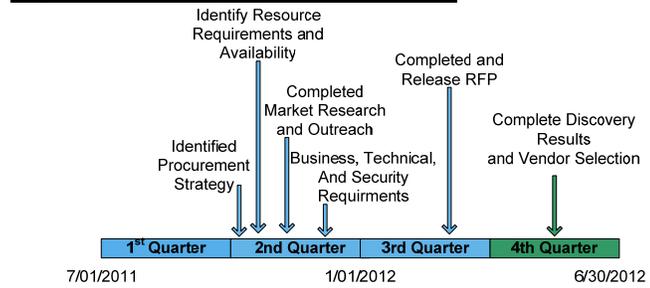
2011/2012 Project Budget
\$19 Thousand



Total Project Budget
\$19 Thousand



Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



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.

Period Ending March 31, 2012:

- Project is complete.

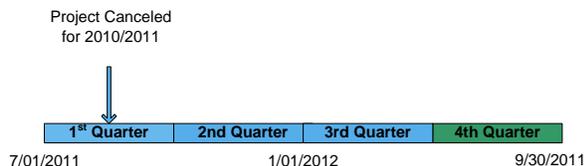
Planned Deliverables by June 30, 2012:

- Project is complete.

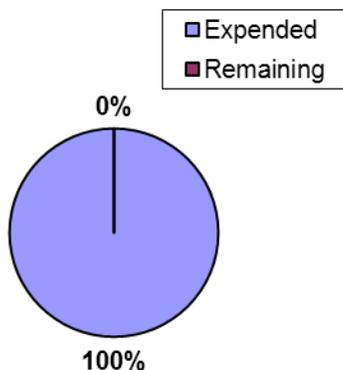
Total Project Cost: Project returned \$31,500 to the Enterprise Program Investment Council (EPIC).

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

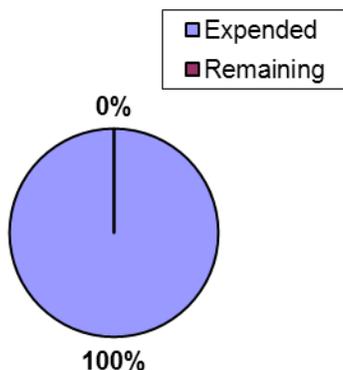
Major Fiscal Year 2011/2012 Milestones



2011/2012 Project Budget
\$17 Hundred



Total Project Budget
\$17 Hundred



Project Name	Purpose	Accomplishments
--------------	---------	-----------------

Investment Accounting

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

Period Ending March 31, 2012:

- Project is complete.

Planned Deliverables by June 30, 2012:

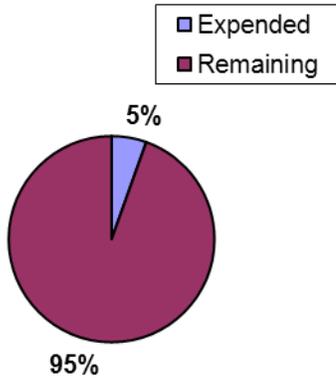
- Project is complete.

Total Project Cost: Project was completed under budget

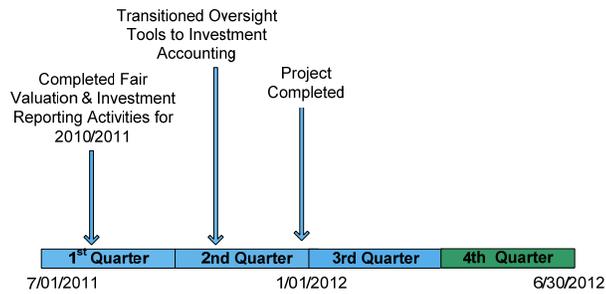
Schedule and Scope: Project was completed within the approved scope and schedule

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

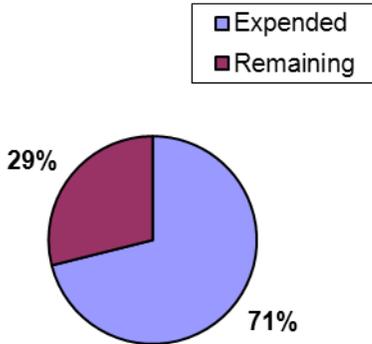
**2011/2012 Project Budget
\$827 Thousand**



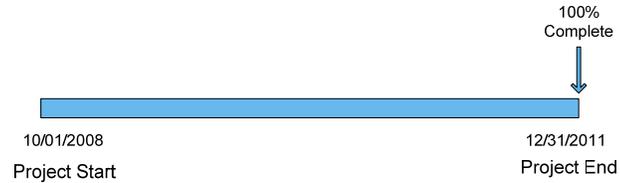
Major Fiscal Year 2011/2012 Milestones



**Total Project Budget
\$2.7 Million**



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.

Period Ending March 31, 2012:

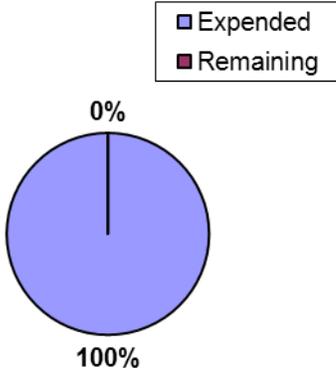
- Completed project close-out report.

Planned Deliverables by June 30, 2012:

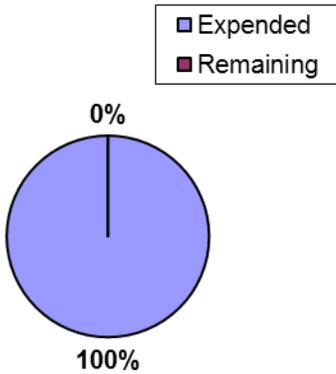
- Receive final approval of project close-out report.
- Project is complete.

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**



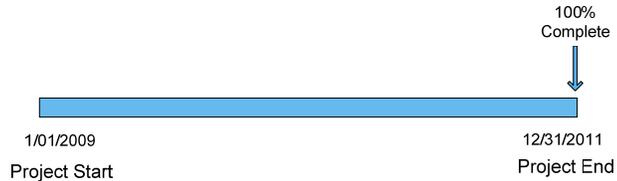
**Total Project Budget
\$1.8 Million**



Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



Omnibus Bill

The Omnibus project will implement high priority/high impact measures in the 2011 Senate Bill 349: Retroactive Service Retirement Benefit effective date; change or cancel option elections and Retirement application changes 30 days after the first payment; and Cash Balance Program contributions not allowed for Defined Benefit retirees.

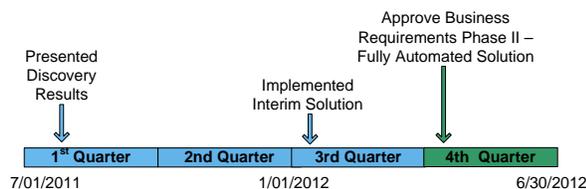
Period Ending March 31, 2012:

- Completed System Integration testing and User Acceptance testing for interim solution.
- Implemented interim solution.
- Updated all member, employer and staff communication.

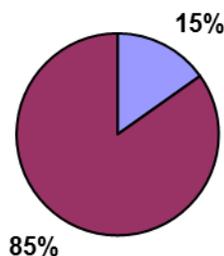
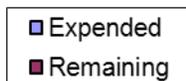
Planned Deliverables by June 30, 2012:

- Approve business requirements for a fully automated solution.
- Initiate corporate database (START) development for fully automated solution.

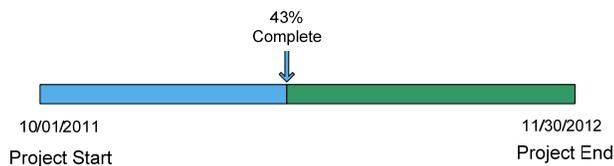
Major Fiscal Year 2011/2012 Milestones



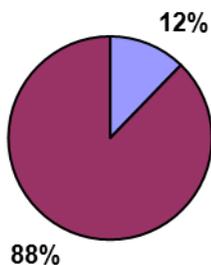
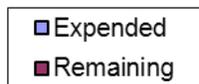
**2011/2012 Project Budget
\$286 Thousand**



Project Schedule Status Timeline



**Total Project Budget
\$355 Thousand**



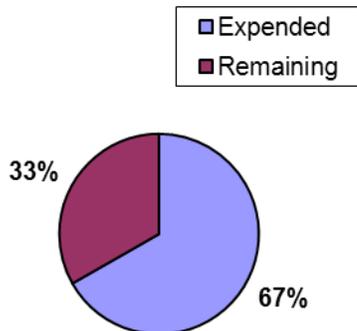
Penalties and Interest

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.

Period Ending March 31, 2012:

- Received approval of change request for addition of project enhancements and related resources.
- Received approval of change request for modification of regulations compliance scope to respond to the Omnibus Bill.
- Secured final CalSTRS board and Office of Administrative Law approval of the revised regulations.
- Completed Secure Employer Web (SEW) site and corporate database (START) development for regulations compliance, and began system integration testing.
- Completed blueprint (design) and configuration and development for regulations version updates and system enhancements and completed unit testing.
- Completed preliminary employer readiness report and continued with readiness support activities.
- Completed training plan, developed a portion of the training materials aligned with new system modifications, and prepared for training deployment.

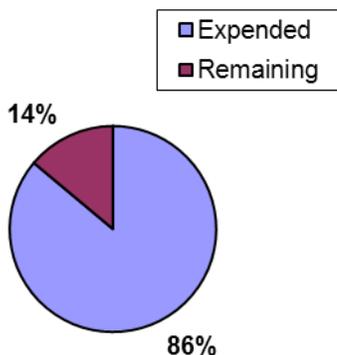
2011/2012 Project Budget
\$4.5 Million



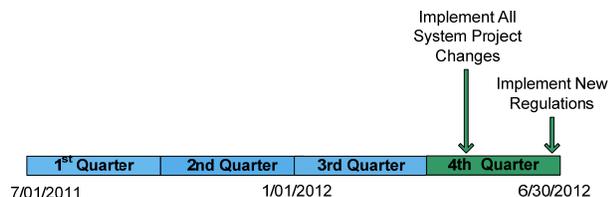
Planned Deliverables by June 30, 2012:

- Complete all remaining development and test activities for Secure Employer Web (SEW) site and corporate database (START).
- Complete all remaining development for regulations compliance including Direct Reporting functionality.
- Complete all remaining test activities for regulations version updates and system enhancements.
- Complete all pre-deployment employer readiness activities and support.
- Complete all training materials and conduct all pre-deployment onsite and offsite training workshops and activities.
- Deploy all aspects of Penalties and Interest Phase 2 into production for a July 1st Regulations Go-Live.
- Complete pilot period (between 5/1/2012 and 6/30/2012).

Total Project Budget
\$11.3 Million



Major Fiscal Year 2011/2012 Milestones



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.

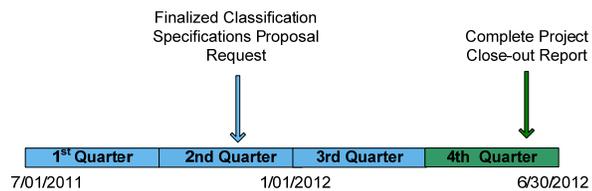
Period Ending March 31, 2012:

- Worked with the State Human Resources control agencies to finalize the Accounting Classification Specifications Proposal Request.
- Developed an organization structure for the Financial Services Branch to accommodate the staffing changes necessary with the implementation of the Corporate Accounting and Resource Management System and submitted it to the branch leadership for approval.

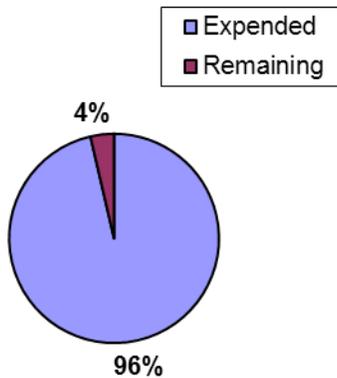
Planned Deliverables by June 30, 2012:

- Receive approval by the State Human Resources control agencies on the Accounting Classification Specifications proposal.
- Complete the creation of the financial services branch reorganization model.
- Complete project close-out report

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.

Period Ending March 31, 2012:

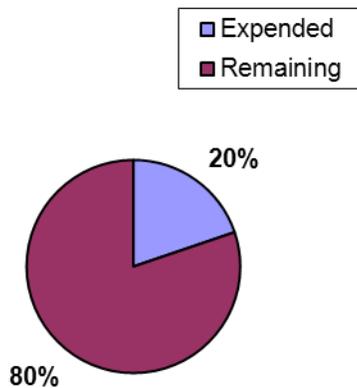
- Completed vendor demonstrations and evaluations.

Planned Deliverables by June 30, 2012:

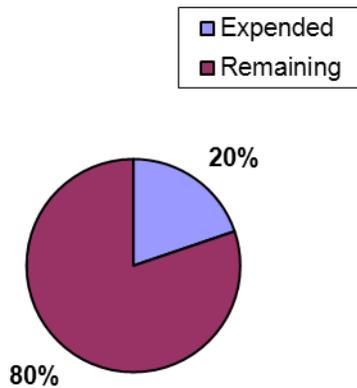
- Complete vendor selection process.
- Request the Enterprise Program Investment Council (EPIC) approval to increase the schedule and budget, if necessary, based on the vendor selection.
- Complete vendor contract execution process and onboarding.
- Initiate tool design and configuration with vendor.

⚠ Schedule Warning: Project is behind schedule due to the procurement process for a Project Portfolio Management (PPM) Tool taking longer than initially estimated. The project will reassess the schedule based on vendor responses to the Request for Proposal and return to EPIC to increase and/budget if necessary.

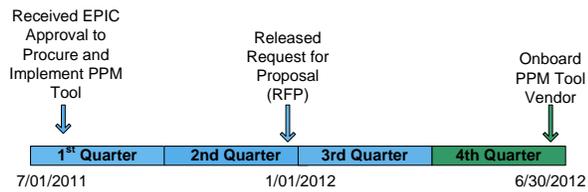
**2011/2012 Project Budget
\$396 Thousand**



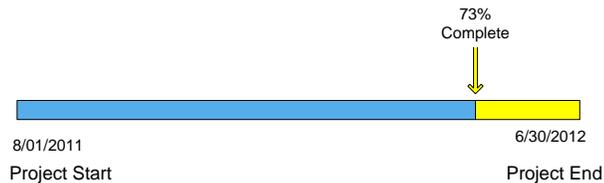
**Total Project Budget
\$396 Thousand**



Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



SchedulePlus

The SchedulePlus Discovery effort will identify potential comprehensive Software as a Service (SaaS) solutions and implementation plan to support member self-scheduling and internal scheduling of workshops, group and individual counseling sessions and Pension2 educational services.

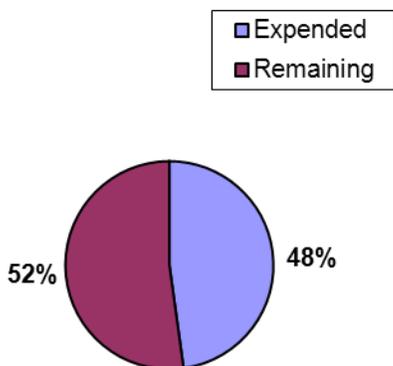
Period Ending March 31, 2012:

- Received approval form Enterprise Program Investment Council (EPIC) to increase schedule and budget to support EPIC's recommended discovery approach and revised scope.
- Completed best practice research.
- Completed market research to identify potential Software as a Service (SaaS) solutions.
- Compiled required and desired scheduling software business feature requirements.
- Changed discovery name from Scheduling System to SchedulePlus.

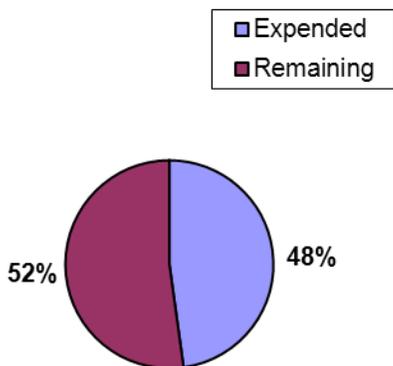
Planned Deliverables by June 30, 2012:

- Execute workshop scheduling tool vendor contract (Certain) for temporary workshop solution.
- Develop plan to implement a temporary workshop solution.
- Develop training plan and user acceptance test scripts for temporary solution.
- Compile discovery results recommendation and present to Enterprise Program Investment Council (EPIC) for approval.
- Complete discovery lessons learned.

2011/2012 Project Budget
\$30 Thousand



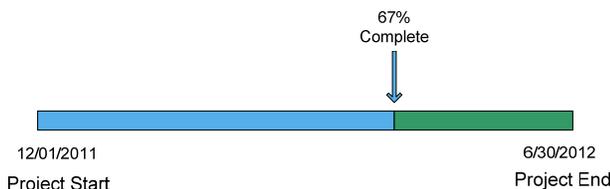
Total Project Budget
\$30 Thousand



Major Fiscal Year 2011/2012 Milestones



Project Schedule Status Timeline



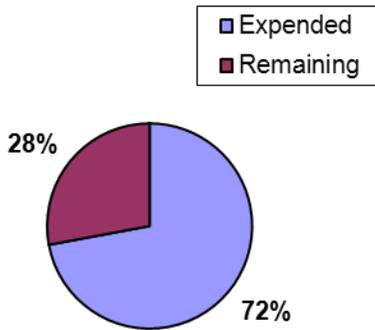
Project Management Office Program

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.

Period Ending March 31, 2012:

- Provided direction for one project (Investment Accounting) preparing a project close-out presentation.
- Provided support for the BusinessRenew Independent Oversight Vendor reporting process.
- Provided direction for two discovery efforts (CalSTRS.com Redesign and Scheduling System) requesting a schedule and budget change.
- Provided direction for one discovery (BusinessRenew: Requirements Management) requesting a schedule extension.
- Provided oversight and management (i.e. scope, schedule, budget, risk, issue) for fourteen enterprise projects/discovery efforts.
- Continued piloting the Priority Management team's new business case.

2011/2012 Project Budget
\$740 Thousand



Planned Deliverables by June 30, 2012:

- Provide direction for business areas developing business cases; projects presenting discovery results recommendations; and/or projects requesting a schedule extension, budget increase or scope modification.
- Provide direction for three BusinessRenew projects/efforts (Pension Solution, Data Preparation, Corporate Accounting and Resource Management, and Independent Project Oversight) requesting a budget change.
- Provide direction for on project (Priority Management – Project Portfolio Management Tool) requesting a schedule and budget change.
- Provide Direction for one project (Actuarial Resources) requesting a scope, schedule and budget change.
- Provide direction for four discoveries (CalSTRS.com Redesign, SchedulePlus m BusinessRenew Pension Solution and BusinessRenew Requirements Management) requesting approval to proceed with discovery results recommendations.
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.
- Draft one post implementation evaluation report (PIER) on the Additional Earnings and Annuity Credit project.
- Initiate the Priority Management process and support the process rollout.
- Hire a new project manager to fill a new vacancy.
- Provide risk training to BusinessRenew project team members.