



Enterprise Technology Projects

Fiscal Year 2015–16
Year End Report

Enterprise Technology Projects

Fiscal Year End 2015/2016

The Enterprise Program Investment Council (EPIC) is responsible for governance of all enterprise technology projects which includes prioritization, resource allocation and oversight of the \$18.5 million annual EPIC Technology Projects Budget. An additional \$15.1 million, not expended during fiscal year 2014/2015 was available for use during fiscal year 2015/2016. As of the end of the fourth quarter, of the \$33.6 million available, \$13.5 million has been allocated to projects of which \$13.5 million has been obligated to date. As part of the Governor's 2015-16 Budget, an additional \$63.1 million was allocated specifically for the Pension Solution Project of which \$47 million was made available to the project to date, through the annual spending plan approval process, and \$43 million has been obligated to date. The remainder will be utilized in future years.

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

Enterprise Program Investment Council Members

Jack Ehnes

Chief Executive Officer

Cassandra Lichnock

Chief Operating Officer

Robin Madsen

Chief Financial Officer

Lisa Blatnick

Chief of Administrative Services

Ed Derman

Deputy Chief Executive Officer
Plan Design and Communication

Ashish Jain

Chief Technology Officer

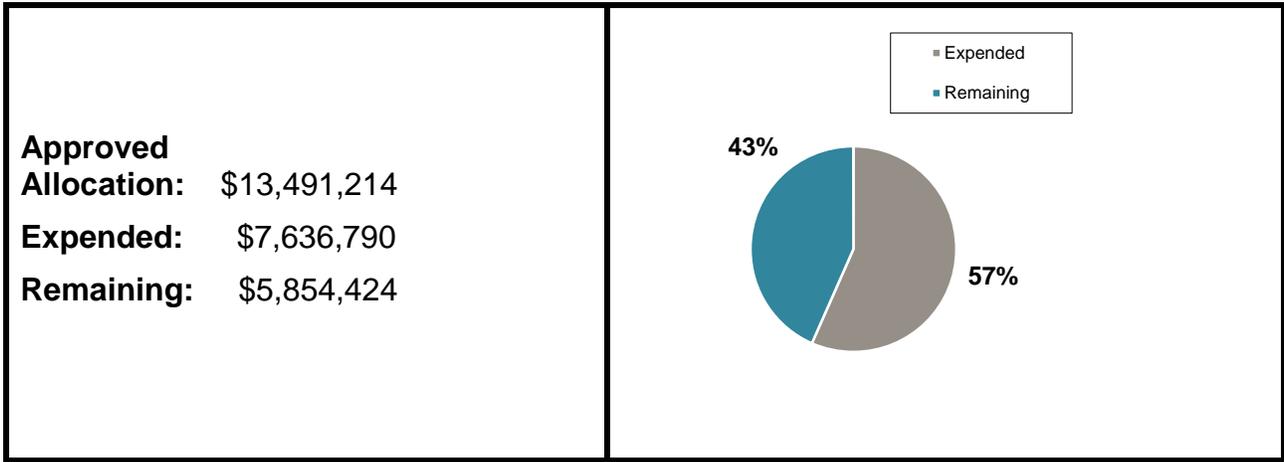
Andrew Roth

Benefits and Services
Executive Officer

Enterprise Technology Projects Fiscal Year End 2015/2016

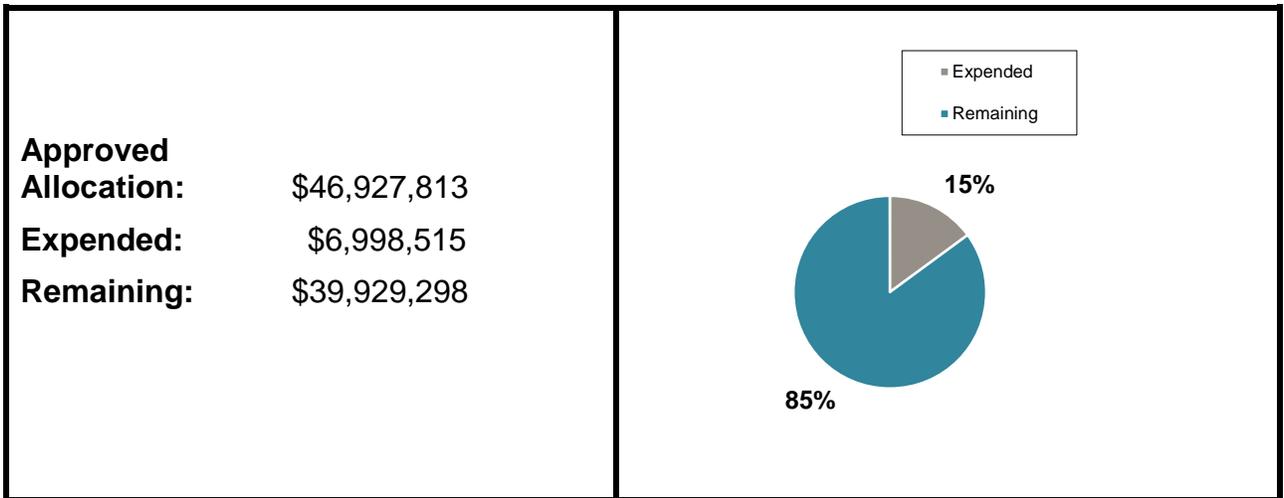
Enterprise Technology Projects' 2015/2016 Budget: \$33.6 Million

As of June 30, 2016



Total Enterprise Technology Pension Project 2015/2016 Budget: \$63.1 Million

As of June 30, 2016



Enterprise Technology Projects Fiscal Year 2015/2016

Project Name	Duration	Project Total ¹	2015/2016 Budget ²	2015/2016 Expended ³	Schedule	Budget
403bCompare Site Redesign	Sep 2015 – Nov 2016	\$935,780	\$534,289	\$341,331	●	●
Additional Earnings/Annuity Credit 2013	Jul 2014 – Apr 2017 ⁴	\$213,400	\$169,900	\$95,627	◆	◆
Additional Earnings/Credit 2014 & 2015	Jan 2016 – Oct 2016	\$143,350	\$113,350	\$49,756	●	●
Annual Update 2015/16	Jul 2015 – Jun 2016	\$0*	\$0	\$0	●	●
BusinessDirect Mini Projects	Nov 2015 – Apr 2016	\$260,000	\$260,000	\$240,000	◆	◆
Data Preparation	Nov 2011 – Dec 2016	\$11,024,855	\$3,582,666	\$1,626,975	⚠ ⁵	●
DBS SLA and PCA Calculation Updates	Jun 2016 – Nov 2017	\$0*	\$0	\$0	●	●
Develop RFP for SAP Managed Services	Dec 2015 – Mar 2016	\$200,000	\$200,000	\$199,892	◆	◆
Full Funding	Jul 2014 – Jun 2016	\$1,293,960	\$0	\$0	◆	◆
Independent Project Oversight	Sep 2011 – Oct 2019	\$6,168,186	\$462,396	\$285,912	●	●
IT Service Management System	May 2016 – May 2017	\$475,000	\$0	\$0	●	●
Multimodal Communication Upgrade	Nov 2015 – Jan 2017	\$5,500,000	\$2,000,000	\$1,650,388	●	●
Omnibus SB1220 – Refund Electronic Funds Transfer (EFT)	Aug 2015 – May 2016	\$0*	\$0	\$0	◆	◆
Pension Program Classification Study	Feb 2014 – Jan 2016	\$203,521	\$61,366	\$39,543	◆	◆
Pension Solution	Jul 2014 - Sep 2017	\$251,800,000 ⁶	\$46,927,813	\$6,998,515	⚠ ⁷	●
Project Support Program	Jan 2011 – Jun 2016	\$7,047,662	\$1,222,912	\$1,127,690	◆	◆
Remove Estimation for Service Credit and Final Compensation	Jun 2016 – Nov 2016	\$0*	\$0	\$0	●	●
Requirements Management	Aug 2011 – Jun 2016	\$1,124,409	\$447,200	\$431,663	◆	◆
Space Optimization	Nov 2015 – Jul 2016	\$1,891,900	\$1,891,900	\$1,109,327	⚠ ⁸	●
Schedule & Budget Indicators:						
	● Acceptable	⚠ Warning	◆ Critical	◆ Complete	◆ Cancelled	⏸ Not Started

* Projects utilize internal resources and operational program budgets.

¹ Project Total – Amount represents the sum of the projects' prior years' actual expended and remaining encumbrance amounts, and current and future years budgeted amounts.

² 2015/2016 Budget – Amount represents the planned budget and may be comprised of funding sources representing multiple years.

³ 2015/2016 Expended – Amount represents the expended amount captured in our financial systems for each project.

⁴ Additional Earnings and Annuity Credits 2013 – Includes funding in fiscal year 2016/17 for post implementation overtime work.

⁵ Data Preparation – Warning status due resource constraints.

⁶ Pension Solution – Represents the total board approved budget.

⁷ Pension Solution – Warning status due to delays in finalizing deliverables.

⁸ Space Optimization – Warning status due to delays in finalizing floor plans for next phase.

403bCompare Site Redesign

The 403bCompare Site Redesign Project will modernize site design and improve usability, reduce or eliminate data integrity issues, reduce workload to monitor and govern data provided by vendors, as well as reduce site operational and maintenance costs.

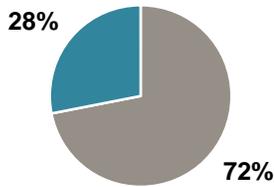
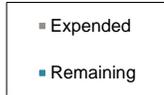
Fiscal Year 2015/2016:

- Received Enterprise Program Investment Council (EPIC) approval for the 403bCompare Site Redesign project.
- Completed system infrastructure development.
- Completed usability study.
- Completed end user browsing and compare functionality.
- Completed member login and profile functionality.
- Completed modification and integration with ancillary systems.

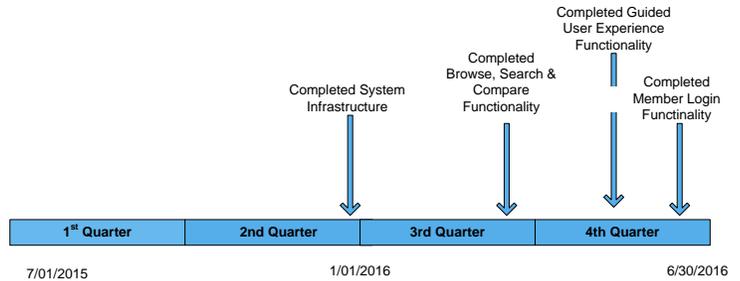
Planned Deliverables for Fiscal Year 2016/2017:

- Complete vendor data management and user management functionality.
- Complete employer data management and user management functionality.
- Complete third party administrator data management and user management functionality.
- Complete 403bCompare administrator data management and user management functionality.
- Implement redesigned 403bCompare Site.

**2015/2016 Project Budget
\$534 Thousand**

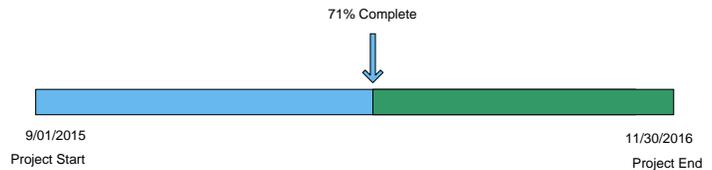
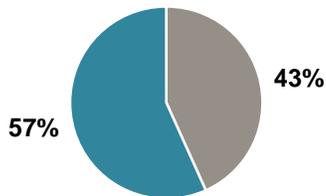


Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline

**Total Project Budget
\$936 Thousand**



Additional Earnings and Annuity Credit (AEC/AAC) 2013

The Additional Earnings and Annuity Credit 2013 project will implement the system changes and business processes that will allow CalSTRS to credit or pay the Additional Earnings and Annuity Credits for 2013.

Fiscal Year 2015/2016:

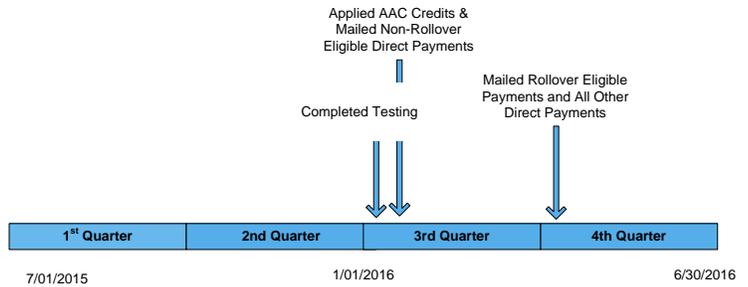
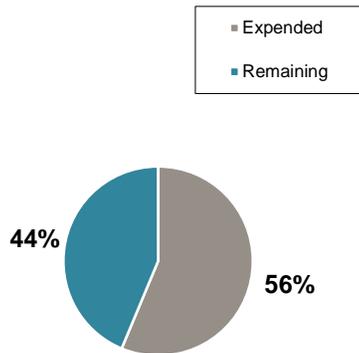
- Completed communication artifacts for all Additional Earnings and Annuity Credits and related payments.
- Completed the procurement process for Phase II print and mail vendor contract.
- Completed Phase II (Additional Annuities Credits and the payments relating to both the Additional Earnings and Annuity Credits).

Planned Deliverables for Fiscal Year 2016/2017:

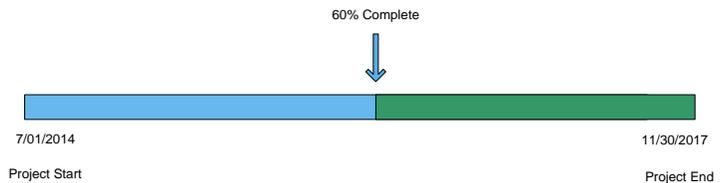
- Complete project closeout report.

Major Fiscal Year 2015/2016 Milestones

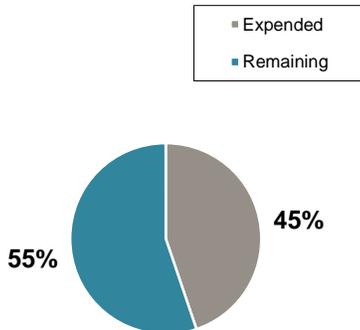
**2015/2016 Project Budget
\$170 Thousand**



Project Schedule Status Timeline (Includes post implementation funding period)



**Total Project Budget
\$228 Thousand**



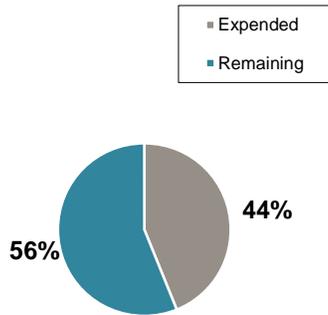
Additional Earnings Credit (AEC) 2014 & 2015

The Additional Earnings and Annuity Credit 2014 & 2015 project will implement the system changes and business processes that will allow CalSTRS to credit or pay the Additional Earnings Credits for 2014 and 2015.

Fiscal Year 2015/2016:

- Received Enterprise Program Investment Council (EPIC) approval for the Additional Earnings (AEC) 2014 & 2015 project.
- AEC 2014 (Phase I)
 - Implemented and applied credits and released non-rollover eligible direct payments.
 - Completed printing and mailing payment letters and rollover packets.
 - Applied manual credits and issued manual non-rollover eligible direct payments.
- AEC 2015 (Phase II)
 - Implemented and applied credits and released non-rollover eligible direct payments.
 - Received Enterprise Program Investment Council (EPIC) approval for a budget increase of \$15K for Financial Services post-implementation work.

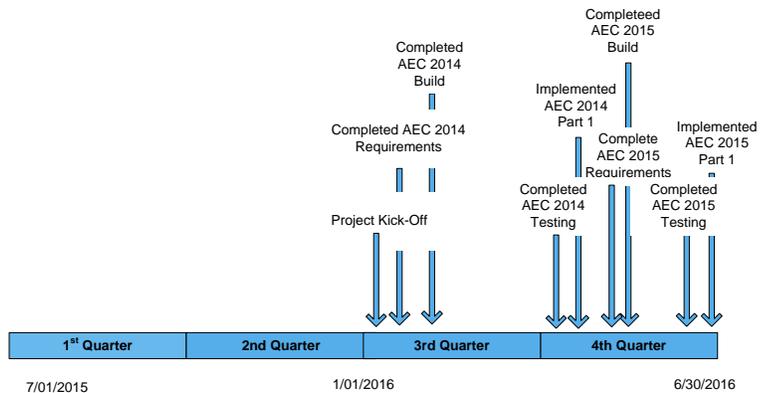
**2015/2016 Project Budget
\$128 Thousand**



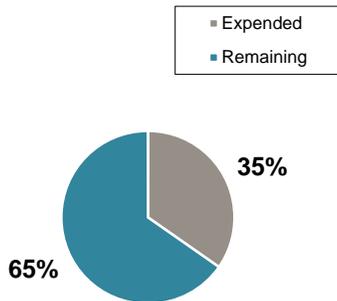
Planned Deliverables for Fiscal Year 2016/2017:

- AEC 2014 (Phase I)
 - Complete processing returned rollover elections.
 - Release rollovers and rollover-eligible direct payments.
 - Issue manual rollovers and rollover-eligible direct payments.
- AEC 2015 (Phase II)
 - Complete printing and mailing payment letters and rollover packets.
 - Apply manual credits and issue non-rollover-eligible direct payments.
 - Complete processing returned rollover elections.
 - Release rollovers and rollover-eligible direct payments.
 - Issue manual rollovers and rollover-eligible direct payments.
- Complete project closeout activities.

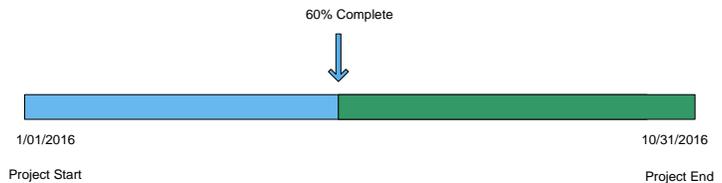
Major Fiscal Year 2015/2016 Milestones



**Total Project Budget
\$128 Thousand**



Project Schedule Status Timeline



Annual Update

The Annual Update process calculates fiscal year-end contributions, interest and yearly service credit; transfers contributions greater than one year of service between Defined Benefit and Defined Benefit Supplement accounts; processes excess contributions and returns monies to employers on behalf of members who earn more than one year of service, produces the *Retirement Progress Reports* (annual member statements), and posts member payroll and service credit data on *myCalSTRS*; produces and validates the Annual Update Account Reconciliation Reports and the Creditable Earning Reconciliation Reports.

No Budget
This annual operational project utilizes internal resources and operational program budgets.

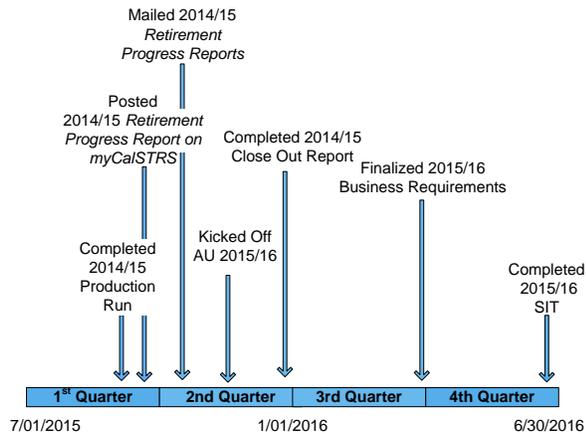
Fiscal Year 2015/2016:

- Completed 2014/15 Annual Update corporate database production run.
- Posted 644,820 2014/15 *Retirement Progress Reports* on *myCalSTRS*.
- Gathered Customer Satisfaction Survey data from 2014/15 Retirement Progress Reports.
- Mailed 2014/15 *Retirement Progress Reports (RPR)* to members who opted to continue to receive paper reports.
- Completed 2014/15 Annual Update project close-out report.
- Finalized requirements, design specifications, and unit and system integration testing for the 2015/16 *Retirement Progress Reports*.
- Submitted initial test data to print and mail services vendor.
- Received 42,582 requests for paper 2015/16 Retirement Progress Reports (RPR).

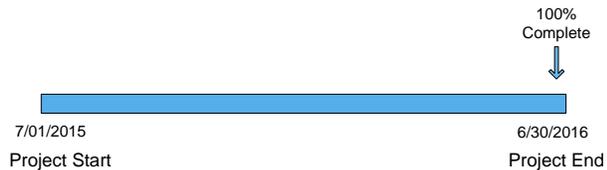
Planned Deliverables for Fiscal Year 2016/2017:

- Receive final 2015/16 employer reports.
- Complete 2015/16 User Acceptance Testing and Annual Update corporate database production run.
- Create and mail 2015/16 Cash Balance and Defined Benefit *Retirement Progress Reports* and post member information to *myCalSTRS* website.
- Gather data from the 2015/16 *Retirement Progress Reports* Customer Satisfaction Survey.
- Complete the 2015/16 Annual Update close-out report.
- Complete requirements, design specifications and unit and system integration testing for the 2016/17 *Retirement Progress Reports*.

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



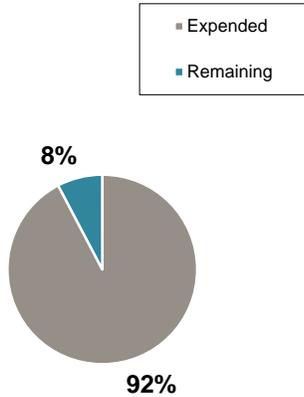
BusinessDirect Mini Projects

The BusinessDirect Mini Projects will allow CalSTRS' current SAP Managed Services provider to complete projects requested by CalSTRS to further enhance the user experience or add functionality to the system.

Fiscal Year 2015/2016:

- Completed all three mini projects.
- Cost Accounting Prep:
 - Reviewed, updated, and finalized cost accounting requirements.
- Recording SRM Business Process Procedures (BPPs):
 - Completed recordings and updates to BPPs.
 - Reviewed, finalized, and published BPPs.
- Business Intelligence (BI) Reporting Enhancements:
 - Completed development, testing and training documentation
 - Trained end users.
 - Completed installation of new reporting tool.

2015/2016 Project Budget
\$260 Thousand

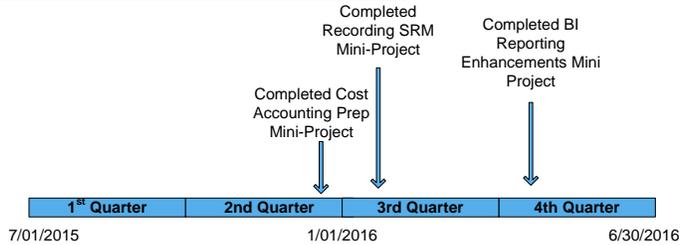


Planned Deliverables for Fiscal Year 2016/2017:

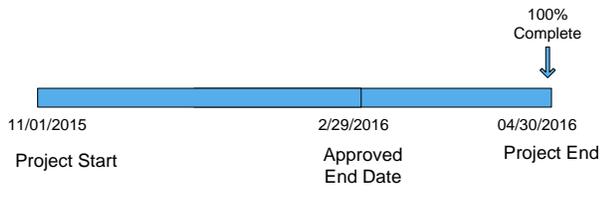
- Project complete.

Project completion was outside of approved project end date due to delays in completing the final of the three mini-projects. The project is on track for completion in April 2016.

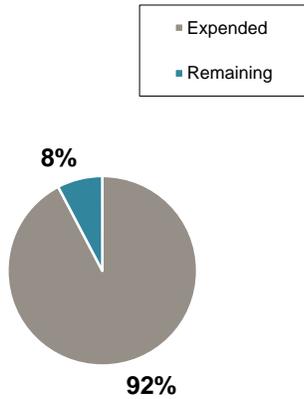
Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline¹



Total Project Budget
\$260 Thousand

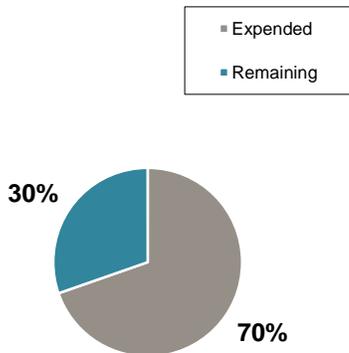


¹ Project completion was outside of approved project end date of February 2016 due to delays in completing the final of the three mini-projects. The project completed in April 2016.

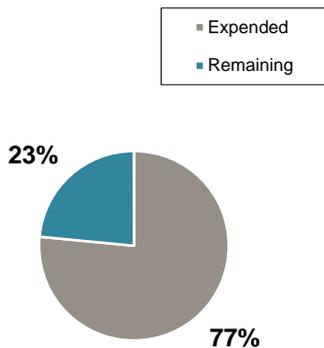
Data Preparation

The Data Preparation project is in the first phase of data cleansing to include data clean-up and preparation for conversion to a new pension solution.

2015/2016 Project Budget
\$3.6 Million



Total Project Budget
\$11 Million



Fiscal Year 2015/2016:

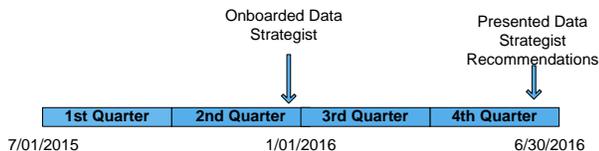
- Received Enterprise Program Investment Council (EPIC) approval for a schedule and budget increase for Phase 1 data cleansing to coincide with Pension Solution Functional Rollout 1.
- On boarded data strategist to assist with developing policies and protocols to support conversion efforts.
- Completed 89% of basic issue cleansing related to Pension Solution's Functional Rollout 1.
- Completed analysis and prioritization of basic issues related to Pension Solution's Functional Rollout 2.
- Completed complex data issues analysis and documented resulting decisions and policies related to Pension Solution's Functional Rollout 1.
- Continued to align Data Preparation activities with the Pension Solution's Functional Rollout Plan.

Planned Deliverables for Fiscal Year 2016/2017:

- Obtain sponsor and steering committee approval on approach for addressing the Functional Rollout 2 complex data issues.
- Request approval from the Enterprise Program Investment Council (EPIC) for to extend the scope, schedule and budget to address basic issues related to Functional Rollout 1 and complex issues related to both Functional Rollouts 1 and 2.
- Complete complex data issues analysis and document resulting decisions and policies related to Pension Solution's Functional Rollout 2.
- Continue highest priority data cleaning activities related to the Pension Solution Functional Rollout 1.
- Continue to align Data Preparation activities with the Pension Solution's Functional Rollout Plan.

Schedule Warning: Project is at risk due to resource constraints.

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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DBS SLA & PCA Calculation Updates

The Defined Benefit Supplement (DBS) Single Life Annuity (SLA) and Period Certain Annuity (PCA) Calculation Updates Project will update CalSTRS Corporate Database START, system functionality to accurately calculate DBS SLA with a cash refund account at the time of death and; calculate members reinstatement with a PCA using the present value 'table in effect' at the time of the original benefit effective date.

No Budget

This project utilizes internal resources and operational program budgets.

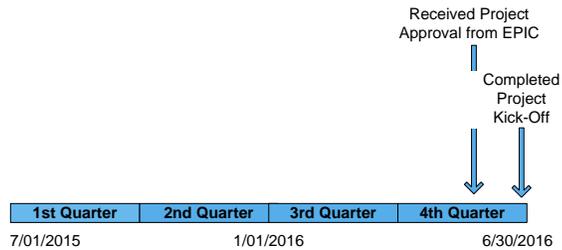
Fiscal Year 2015/2016:

- Received Enterprise Program Investment Council (EPIC) project approval.
- Developed Project Charter and received project sponsor approval.
- Created high-level project schedule.
- Conducted project kicked-off meeting.

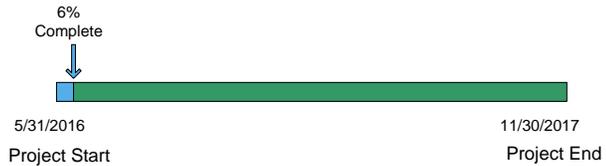
Planned Deliverables for Fiscal Year 2016/2017:

- Finalize detailed project schedule.
- Complete analysis and requirements gathering phase.
- Complete design and build phases and system integration testing (SIT).
- Commence User Acceptance Test (UAT).

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Develop RFP for SAP Managed Services

The Develop RFP for SAP Managed Services Project included completing a full scale review of current state SAP documentation, creating a comprehensive RFP that will attract bids for a new contract for SAP Managed Services..

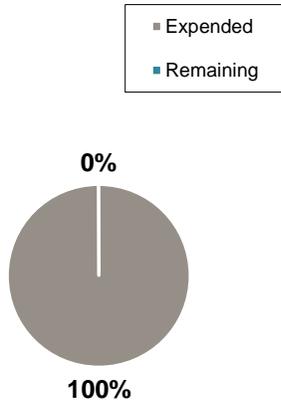
Fiscal Year 2015/2016:

- Conducted workshops to share current state and potential future state of SAP and associated technology at CalSTRS.
- Completed the collection and organization of system documentation to be used in conjunction with Request for Proposal (RFP).
- Reviewed, finalized and released Request for Proposal (RFP) on 2/29/2016.
- Finalized document repository with secure access for potential bidders.
- Conducted Q&A sessions with potential bidders and published all answers to both verbal and written questions in addendum to RFP on 3/21/2016.
- Project completed.

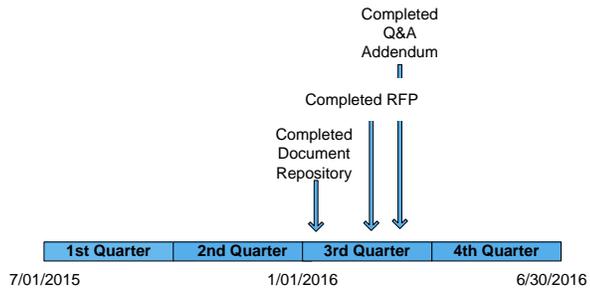
Planned Deliverables for Fiscal Year 2016/2017:

- Project complete.

2015/2016 Project Budget
\$200 Thousand



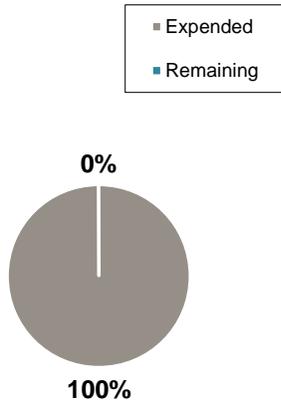
Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Total Project Budget
\$ 200 Thousand



Full Funding

The Full Funding project is implementing system and process changes due to the passage of AB1469, which increased member, employer and state contribution rates to address the unfunded liability of CalSTRS' Defined Benefit Program.

Fiscal Year 2015/2016:

- Completed testing of all system enhancements in conjunction with Annual Update.
- Implemented system enhancements to BusinessDirect financial reports for employer's return of excess contributions.
- Paid out member and employer excess contributions for the 2014/15 fiscal year to employers.
- Received Enterprise Program Investment Council (EPIC) approval to increase the scope and schedule to update the corporate database, START, to allow for a five digit member contribution rate.
- Implemented remaining system enhancements to BusinessDirect's financial reports for employer contribution reconciliation and proportionate share.
- Completed corporate database enhancements.
- Completed lessons learned session.
- Completed project closeout activities.

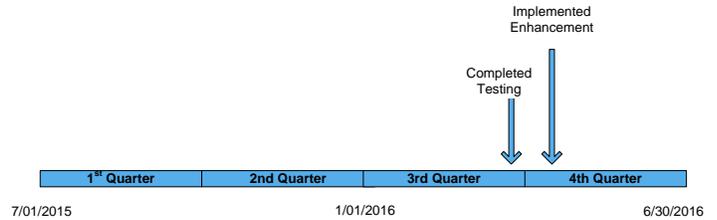
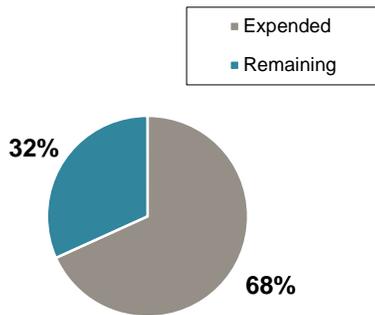
**2015/2016 Project Budget
No Funding**

Planned Deliverables for Fiscal Year 2016/2017:

- Project complete.

Major Fiscal Year 2015/2016 Milestones

**Total Project Budget
\$1.3 Million**



Project Schedule Status Timeline



Independent Project Oversight

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

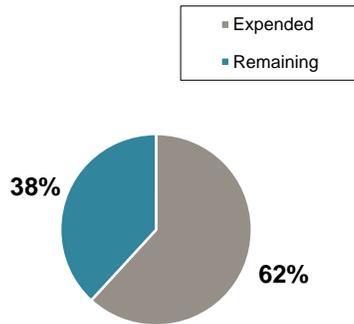
Fiscal Year 2015/2016:

- Completed monthly comprehensive status reports for Pension Solution and Data Preparation.
- Monitor the Data Preparation Phase 1 cleansing activities and Phase 1 and 2 analysis activities.
- Monitor the Pension Solution project phases.
- Monitor adherence to the Pension Solution governance process.
- Develop board presentation regarding the status of the Pension Solution and Data Preparation projects.

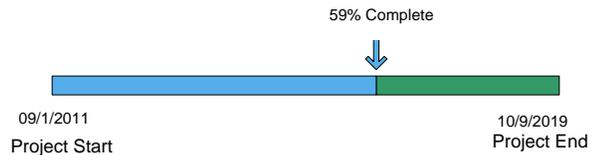
Planned Deliverables for Fiscal Year 2016/2017:

- Complete monthly comprehensive status reports for Pension Solution and Data Preparation.
- Monitor the Data Preparation Phase 1 and 2 data analysis and cleansing activities.
- Monitor the Pension Solution project phases.
- Monitor adherence to the Pension Solution governance process.
- Develop board presentation regarding the status of the Pension Solution and Data Preparation projects.

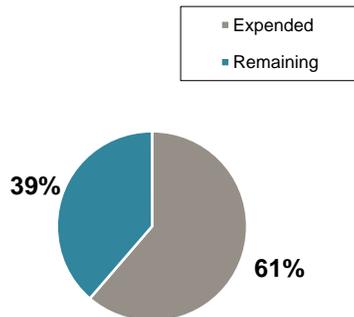
2015/2016 Project Budget
\$462 Thousand



Project Schedule Status Timeline



Total Project Budget
\$5.9 Million



Note: Beginning with Fiscal Year 2015_16, Pension Solution associated budget is being moved to the Pension Solution budget at the beginning of each fiscal year.

Project Name	Purpose	Accomplishments
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IT Service Management System Project

The IT Service Management (ITSM) System project will replace the current, unsupported Service Desk system (also known as Unicenter), with a modern and hosted ITSM solution.

Fiscal Year 2015/2016:

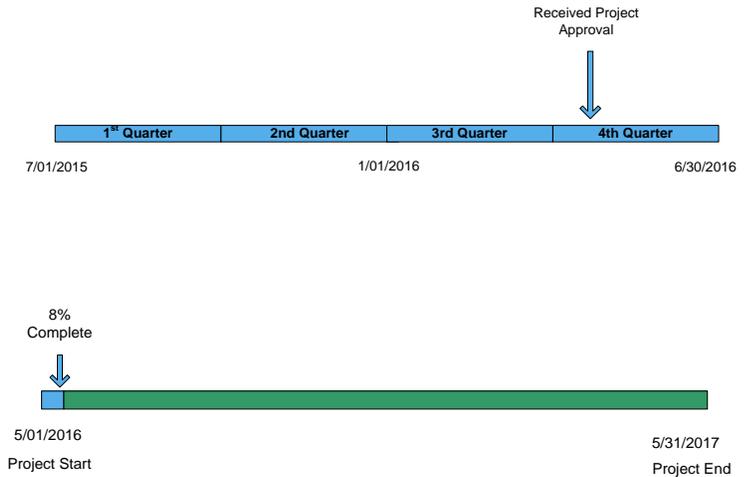
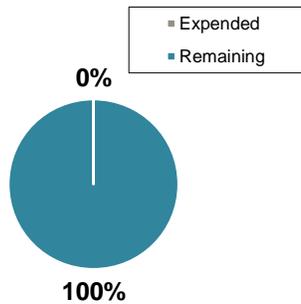
- Received Enterprise Program Investment Council (EPIC) project approval with direction to consider the integration between the IT Asset Management component and the BusinessDirect system.
- Researched IT Asset Management (ITAM) best practices and interviewed relevant stakeholders to determine the best approach for integration between IT Asset Management system component and BusinessDirect.
- Commenced solicitation development.

Planned Deliverables for Fiscal Year 2016/2017:

- Finalize the integration approach between the IT Asset Management system component and BusinessDirect.
- Procure an ITSM solution and an integration vendor.
- Complete the ITSM implementation, testing and training.
- Complete project close-out activities.

**2015/2016 Project Budget
No Funding**

**Total Project Budget
\$475,000**



Multimodal Communication Upgrade (MCU) Project

The Multimodal Communication Upgrade – The project consists of two phases to upgrade the audio visual equipment throughout the headquarters building. Phase 1 includes equipment in the Board Room, Sacramento River, American River, Caucus Room, 15th Floor Control Room, and 15th Floor Edit Suite. Phase 2 includes all medium and large conference rooms, training rooms and building displays.

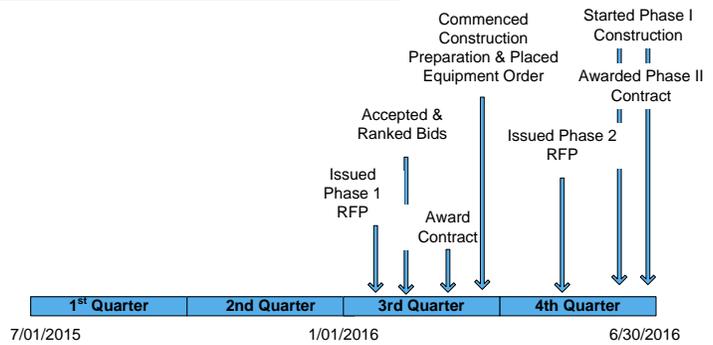
Fiscal Year 2015/2016:

- Ordered Phase 1 audiovisual (AV) equipment.
- Began Phase 1 construction.
- Requested and received Enterprise Program Investment Council (EPIC) approval to extend project scope and budget to include Phase 2.
- Completed Phase 2 construction documents, equipment list and Request for Proposal (RFP).
- Released Phase 2 RFP and identified contract award.

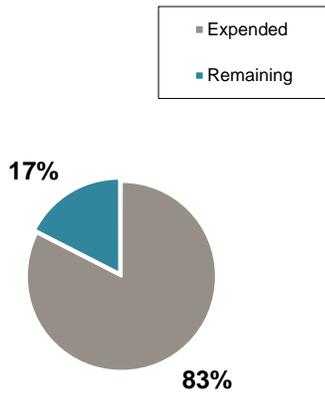
Planned Deliverables for Fiscal Year 2016/2017:

- Complete Phase 1 audiovisual (AV) equipment installation, testing and training.
- Order Phase 2 AV equipment.
- Complete Phase 2 (AV) equipment installation, testing and training.

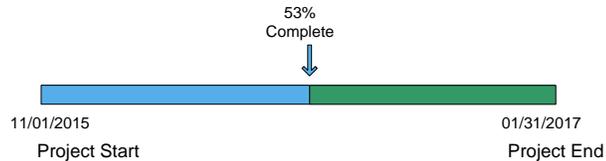
Major Fiscal Year 2015/2016 Milestones



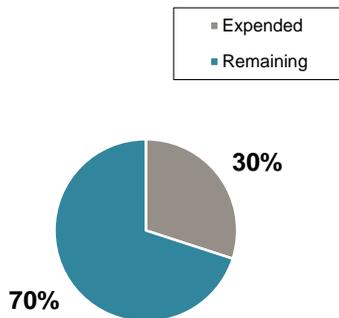
2015/2016 Project Budget \$2 Million



Project Schedule Status Timeline



Total Project Budget \$5.5 Million



Omnibus SB1220 Refund Electronic Funds Transfer (EFT)

The Omnibus SB 1220 Refund Electronic Funds Transfer project is implementing system and process changes due to the passage of SB1220, which allows members to receive a refund of their Defined Benefit and Defined Benefit Supplemental contributions via electronic funds transfer, increasing the security of refund distributions.

Fiscal Year 2015/2016:

- Refined project resource estimate for system enhancements to the corporate database, START, and myCalSTRS.
- Refined implementation schedule and new project end date.
- Requested Enterprise Program Investment Council (EPIC) approval to extend the project schedule resulting in decision to cancel project and wait for the functionality as part of the Pension Solution project.

Planned Deliverables for Fiscal Year 2016/2017:

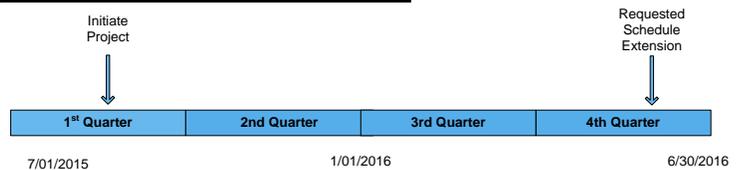
- Project cancelled.

No Budget

This project utilizes internal resources and operational program budgets.

◆ **Project Cancelled:** Project was cancelled due to constrained resources. The law does not require the functionality and the functionality will be available with Pension Solution's Functional Rollout 2.

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Pension Program Classification Study

The Pension Program Classification Study will allow CalSTRS to align the Pension Program series responsibilities and functions with current and future needs in order to recruit and retain the right individuals for the right jobs. The project completed its second phase and included conducting salary surveys, identifying minimum qualifications and preparing State Personnel Board materials.

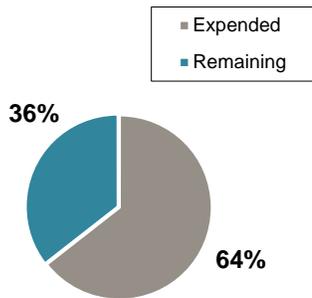
Fiscal Year 2015/2016:

- Finalized Pension Program classifications specifications.
- Finalized CalHR Board Item package.
- Completed project closeout activities.
- Post-Project Update: The study resulted in completed classification concepts and a final Board Item package for submission to CalHR. Due to a competing statewide classification consolidation effort led by CalHR, CalSTRS has put the Board Item on hold. CalSTRS is presently participating with CalHR on this effort to support incorporation of the Pension Program classes into future statewide generalist consolidation.

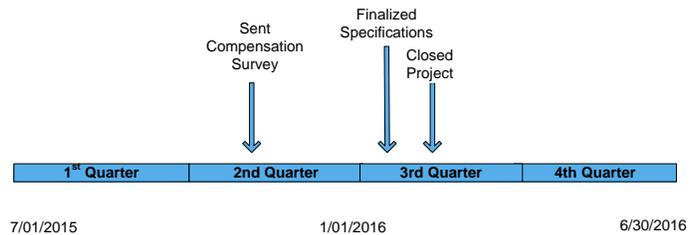
Planned Deliverables for Fiscal Year 2016/2017:

- Project complete

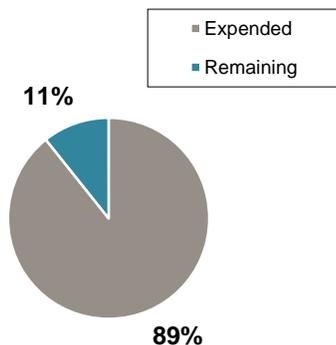
2015/2016 Project Budget
\$61 Thousand



Major Fiscal Year 2015/2016 Milestones



Total Project Budget
\$204 Thousand



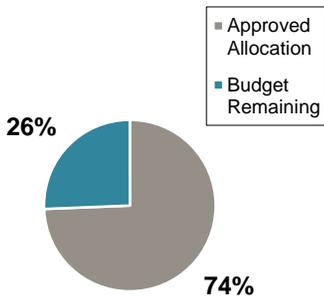
Project Schedule Status Timeline



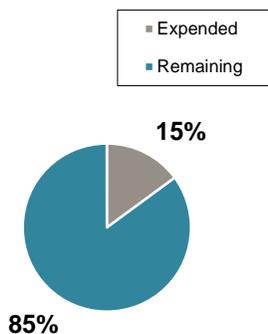
Pension Solution

The Pension Solution project will replace our existing pension administration system in order to strengthen automated internal controls and bring consistent and sustainable business processes for member data.

**2015/2016
Approved Allocation vs.
Budget Remaining¹
\$63 Million**



**2015/2016
Approved Allocation
vs. Actual¹
\$47 Million**



Fiscal Year 2015/2016:

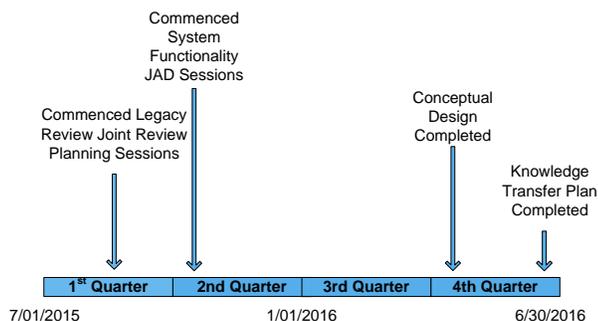
- Onboarded Pension Solution vendor and completed project Start-Up phase.
- Baselined overall project plan and resource-loaded project schedule.
- Completed Requirements Confirmation, Conceptual Design, and Business Process Alignment phase of the project.
- Obtained approval of Functional Rollout Plan.
- Conducted project training for internal team members.
- Completed build out of the first wave of the new technology infrastructure.
- Initiated system build and conversion activities for the first functional release.
- Completed design sessions for first-release functionality.
- Conducted Employer Forums for employer readiness outreach.
- Selected and on-boarded vendor to perform independent security assessment of new infrastructure.
- Requested and received Enterprise Program Investment Council (EPIC) approval of the fiscal year 2016/17 spend plan.

Planned Deliverables for Fiscal Year 2016/2017:

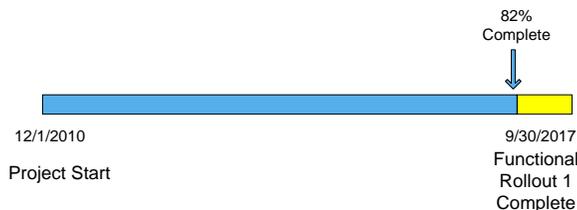
- Complete development activities for Bridging and Interfaces needed for the first functional rollout.
- Complete contractor acceptance test (CAT) activities for first functional rollout. This will include system test, performance test, and parallel test activities.
- Prepare for user acceptance test (UAT) including script development, training and planning activities.
- Commence UAT activities.
- Develop and deliver employer training for the employer portal.
- Develop and deliver internal staff training for functions impacted by the first rollout.

⚠ Schedule Warning: Project is at risk due to delays in finalizing deliverables.

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline²



¹ Pension Solution budget related chart values reflect the BCP budget only and associated approved annual spending plan opposed to total and current year EPIC budget values used for other enterprise projects.

² Pension Solution Status Timeline reflects the percent complete from the project Discovery phase through the first functional rollout.

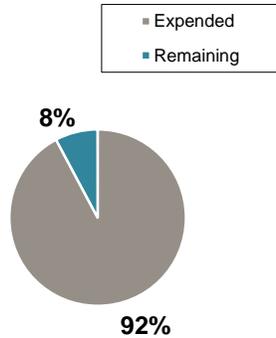
Project Support Program

The Project Support Program supports Enterprise Program Investment Council projects to achieve the strategic benefits and objectives by facilitating the optimization of costs, resources and staffing, risk management and overall support.

Fiscal Year 2015/2016:

- Provided on-going project support.
- Provided on-going risk and issue management and vendor management for the Pension Solution project.
- Provided change management support for the 5th Floor Space Optimization project.
- Provided organizational change management support for large BusinessRenew projects (Pension Solution, Data Preparation, and Requirements Management).
- Utilized the change champion program to provide ongoing change support for internal stakeholders.
- Provided ongoing support for employers.
- Conducted Employer Forums.
- Transitioned the change management team to the Pension Solution project.
- Closed the Project Support program and transitioned resources to either Pension Solution, Pension Solution backfill or the appropriate business area.

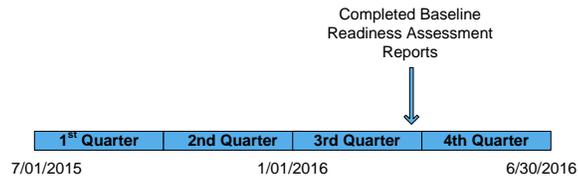
2015/2016 Program Budget
\$1.2 Million



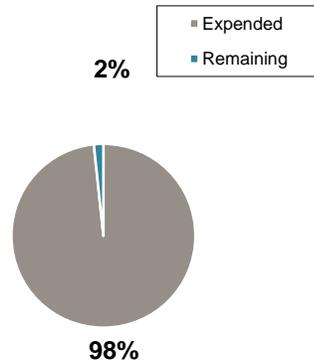
Planned Deliverables for Fiscal Year 2016/2017:

- Program closed.

Major Fiscal Year 2015/2016 Milestones



Total Program Budget
\$7 Million



Remove Estimation for Service Credit and Final Compensation

Utilize the actual data residing in START for the initial benefit calculations instead of the estimated payment information. Use of the actual date versus estimates will result in more accurate benefit payments.

No Budget
 This project utilizes internal resources and operational program budgets.

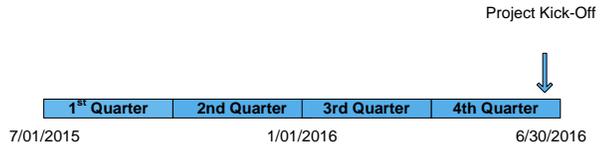
Fiscal Year 2015/2016:

- Received Enterprise Program Investment Council (EPIC) approval of the initial project scope, schedule and budget.
- Completed project initiation.

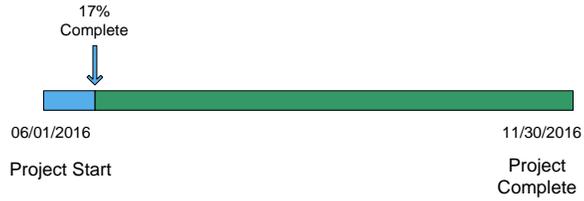
Planned Deliverables for Fiscal Year 2016/2017:

- Complete requirements, design and build phases.
- Complete testing and implement into production.
- Complete project closeout activities.

Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Requirements Management

The Requirements Management Project implemented a requirements management tool, the Requirements Management Plan (RMP), and a requirements management process and converted the Pension Solution Requirements and migrated existing requirements as identified by the project. The project also further utilized the tool for test and release management.

Fiscal Year 2015/2016:

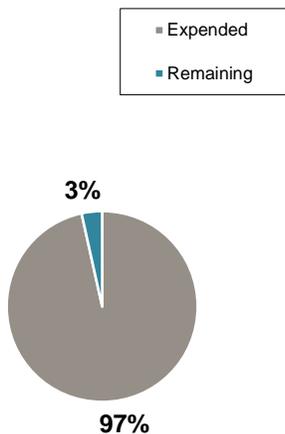
- Migrated legacy system requirements to the new tool.
- Retired existing requirements management tools.
- Completed training on the tool and related processes and roles.
- Initiated project plan and schedule updates for new tool test and release management functionality, enhanced processes, and roles.
- Configured tool for test and release management functionality.
- Completed testing, training, deployment and transition for test and release management functionality.
- Completed project closeout activities.

Planned Deliverables for Fiscal Year 2016/2017:

- Project complete.

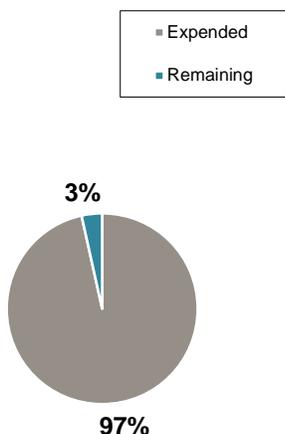
2015/2016 Project Budget

\$447 Thousand

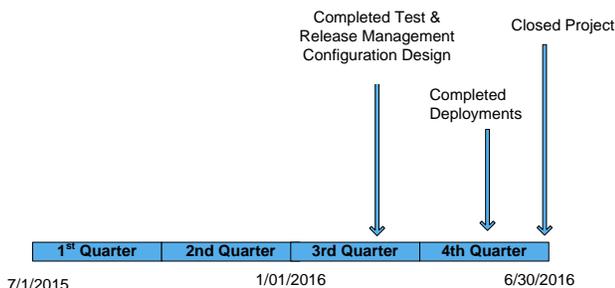


Total Project Budget

\$1.1 Million



Major Fiscal Year 2015/2016 Milestones



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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Space Optimization

The Space Optimization project will optimize workspace throughout the building in order to provide growth for current business needs and the expected short-term growth. The current scope and schedule represents optimization activities on floors 5, 9, 11, and 12.

Fiscal Year 2015/2016:

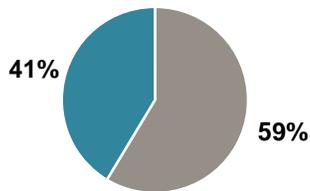
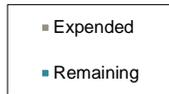
- Completed 5th floor space optimization effort and related project closeout activities.
- Requested and received Enterprise Program Investment Council (EPIC) approval to extend the scope and schedule to include space optimization activities for floors 9, 11 and 12.
- Commenced and completed space optimization on floor 9.
- Completed phases 1 through 4 on floors 11 and 12.

Planned Deliverables for Fiscal Year 2016/2017:

- Complete space optimization on floors 11 and 12.
- Request and receive Enterprise Program Investment Council (EPIC) approval to extend the schedule to include space optimization activities for remaining tower floors 3-4, 6-8, 10, and 14-16.

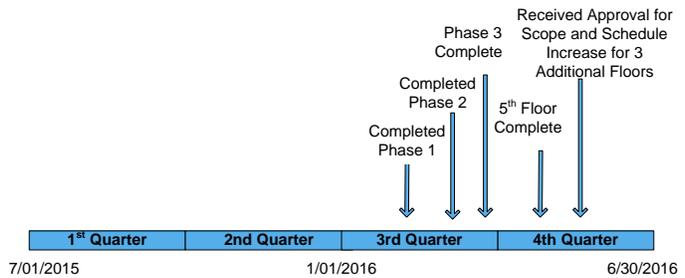
2015/2016 Project Budget

\$1.9 Million



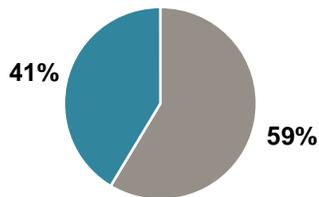
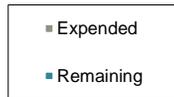
Schedule Warning: Project is at risk due to delays in finalizing floor plans for next phase.

Major Fiscal Year 2015/2016 Milestones



Total Project Budget

\$1.9 Million



Project Schedule Status Timeline

