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 is available for use during fiscal year 2015/2016. As of the end of the third quarter, of the $33.6 million available, $12.5 million has been allocated to projects of which $9 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 has been made available to the project and $43 million has been obligated to date.

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' 2015/2016 Budget: $33.6 Million
As of March 31, 2016

| Approved Allocation: | $12,514,671 |
| Expended:            | $3,564,336  |
| Remaining:           | $8,950,335  |

Expended: 28%
Remaining: 72%

Total Enterprise Technology Pension Project 2015/2016 Budget: $63.1 Million
As of March 31, 2016

| Approved Allocation: | $46,927,812 |
| Expended:            | $4,832,424  |
| Remaining:           | $42,095,388 |

Expended: 10%
Remaining: 90%

Quarter Ending March 31, 2016
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Duration</th>
<th>2015/2016 Budget 2</th>
<th>2015/2016 Expended 3</th>
<th>Schedule</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>403b Compare Site Redesign</td>
<td>Sep 2015 – Nov 2016</td>
<td>$935,780</td>
<td>$534,289</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Earnings/Annuity Credit 2013</td>
<td>Jul 2014 – Apr 2017</td>
<td>$228,400</td>
<td>$169,900</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Update 2015/16</td>
<td>Jul 2015 – Jun 2016</td>
<td>$0</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BusinessDirect Mini Projects</td>
<td>Nov 2015 – Feb 2016</td>
<td>$260,000</td>
<td>$260,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Preparation</td>
<td>Nov 2011 – Dec 2016</td>
<td>$11,024,855</td>
<td>$3,582,666</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop RFP for SAP Managed Services</td>
<td>Dec 2015 – Mar 2016</td>
<td>$200,000</td>
<td>$200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Full Funding</td>
<td>July 2014 – Jun 2016</td>
<td>$1,293,960</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Independent Project Oversight</td>
<td>Sep 2011 – Oct 2019</td>
<td>$6,168,186</td>
<td>$462,396</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multimodal Communication Upgrade</td>
<td>Nov 2015 – Sep 2016</td>
<td>$2,000,000</td>
<td>$2,000,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Omnibus SB1220 – Refund Electronic Funds Transfer (EFT)</td>
<td>Aug 2015 – May 2016</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td></td>
</tr>
<tr>
<td>Pension Program Classification Study</td>
<td>Feb 2014 – Jan 2016</td>
<td>$203,521</td>
<td>$61,366</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pension Solution</td>
<td>Jul 2014 - Sep 2017</td>
<td>$251,800,000</td>
<td>$45,056,905</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Support Program</td>
<td>Jan 2011 – Jun 2016</td>
<td>$7,047,662</td>
<td>$1,222,912</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirements Management</td>
<td>Aug 2011 – Jun 2016</td>
<td>$1,124,409</td>
<td>$447,200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Space Optimization</td>
<td>Nov 2015 – Apr 2016</td>
<td>$1,891,900</td>
<td>$1,891,900</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Schedule & Budget Indicators:**
- **Acceptable**
- **Warning**
- **Critical**
- **Complete**
- **Not Started**

---

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 of one position for one year following implementation.
5. **Annual Update 2015/16** – Utilizes internal resources and operational program budgets.
6. **BusinessDirect Mini Projects** – Delays in completing the final of the three mini-projects and on track for completion in April 2016.
7. **Omnibus SB 1220 Refund Electronic Fund Transfer** – Utilizes internal resources and operational program budgets.
8. **Omnibus SB 1220 Refund Electronic Fund Transfer** – Delays in project initiation.
9. **Pension Solution** – Represents the total board approved budget for the complete project. The identified duration end date of September 2017 represents the duration through the first planned functional rollout.
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.

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Purpose</th>
<th>Accomplishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>403bCompare Site Redesign</td>
<td></td>
<td>Period Ending March 31, 2016:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Completed browse vendor functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Completed browse products functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Completed product search and filter functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Completed usability study.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Planned Deliverables by June 30, 2016:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Complete compare products functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Complete member login functionality.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Complete integration with investment data provider.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Release website for external user acceptance testing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Major Fiscal Year 2015/2016 Milestones</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1st Quarter:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2nd Quarter:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3rd Quarter:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4th Quarter:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Website Rollout for External User Testing</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Completed System Infrastructure</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Completed Browse, Search &amp; Compare Functionality</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complete Morningside Data Integration</td>
</tr>
</tbody>
</table>

2015/2016 Project Budget
$534 Thousand

53% Expended
47% Remaining

Total Project Budget
$936 Thousand

29% Expended
71% Remaining

Quarter Ending March 31, 2016
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.

**Period Ending March 31, 2016:**
- Completed communications specific to Phase II.
- Applied Additional Annuity Credits (AAC).
- Issued Additional Earnings (AEC) and AAC direct payments and printed and mailed associated payment letters.
- Printed and mailed rollover forms to rollover-eligible AEC/AAC payment recipients.
- Issued direct and manual AEC/AAC payment letters and rollover forms.
- Completed issuing all manual AEC/AAC non-rollover eligible payments.
- Continued processing rollover elections.

**Planned Deliverables by June 30, 2016:**
- Complete processing rollover elections.
- Release rollovers and rollover-eligible direct payments.
- Issue manual rollovers and rollover-eligible direct payments.
- Complete lessons learned session.
- Complete project closeout report.

**Major Fiscal Year 2015/2016 Milestones**
- Mail Rollover Eligible Payments and All Other Direct Payments
- Applied AAC Credits & Mailed Non-Rollover Eligible Direct Payments
- Complete Project Closeout
- Completed Testing
- 1st Quarter 2nd Quarter 3rd Quarter 4th Quarter
- 7/01/2015 1/01/2016 7/01/2015 6/30/2016

**Project Schedule Status Timeline**
- 52% Complete
- 7/01/2014 11/30/2017
- Project Start Project End

**2015/2016 Project Budget**
- $170 Thousand
  - Expended 30%
  - Remaining 70%

**Total Project Budget**
- $228 Thousand
  - Expended 22%
  - Remaining 78%
### 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.

#### Period Ending March 31, 2016:
- Completed Project Kick-off.
- Completed Additional Earnings Credit (AEC) 2014 detailed requirements.
- Completed AEC 2014 Design and Build Phase.

#### Planned Deliverables by June 30, 2016:
- Complete Additional Earnings Credit (AEC) 2014 testing.
- Complete AEC 2014 related communications related.
- Implement AEC 2014 and apply credits and issue non-rollover eligible direct payments.
- Complete printing and mailing of payment letters and rollover packets.
- Issue manual AEC2014 non-rollover eligible direct payments.
- Complete AEC 2015 detailed requirements.
- Complete testing for AEC 2015.
- Complete AEC 2015 communications.
- Implement AEC 2015 and apply credits and issue non-rollover eligible direct payments.

#### Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Start Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Kick-Off</td>
<td>1/01/2016</td>
<td></td>
</tr>
<tr>
<td>Completed AEC 2014 Requirements</td>
<td>7/01/2015</td>
<td></td>
</tr>
<tr>
<td>Complete AEC 2014 Testing</td>
<td>1/01/2016</td>
<td></td>
</tr>
<tr>
<td>Complete AEC 2015 Requirements</td>
<td>7/01/2015</td>
<td></td>
</tr>
<tr>
<td>Complete AEC 2015 Testing</td>
<td>1/01/2016</td>
<td></td>
</tr>
</tbody>
</table>

### 2015/2016 Project Budget

$128 Thousand

<table>
<thead>
<tr>
<th>Expenditure Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expended</td>
<td>$0</td>
</tr>
<tr>
<td>Remaining</td>
<td>$128 Thousand</td>
</tr>
</tbody>
</table>

### Total Project Budget

$128 Thousand

<table>
<thead>
<tr>
<th>Expenditure Status</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expended</td>
<td>$0</td>
</tr>
<tr>
<td>Remaining</td>
<td>$128 Thousand</td>
</tr>
</tbody>
</table>

### Project Schedule Status Timeline

- 30% Complete
- Project Start: 1/01/2016
- Project End: 10/31/2016
No Budget
This annual operational project utilizes internal resources and operational program budgets.

Period Ending March 31, 2016:
- Closed Annual Update 2014/15 project.
- Finalized Annual Update 2015/16 project charter and roles and responsibilities.
- Received Sponsor approval for two new Annual Update 2015/16 enhancements:
  1. Add Membership date to Retirement Progress Report (RPR); add Contribution Rate to myCalSTRS.
  2. Include variable data for Additional Earnings Credit (AEC) for 2013/14 and 2014/15.
- Finalized Annual Update 2015/16 business requirements.
- Continue to receive and track member requests for hard copy (mailed) 2015/16 Retirement Progress Report (RPR). Received 40,639 requests as of March 2016.
- Finalized the print and mail services vendor delivery schedule.

Planned Deliverables by June 30, 2016:
- Complete code and unit test in preparation for System Integration Testing (SIT).
- Submit initial test data to print and mail services vendor.
- Complete System Integration Testing (SIT).

Major Fiscal Year 2015/2016 Milestones

Project Schedule Status Timeline

Quarter Ending March 31, 2016
### Project Name
BusinessDirect Mini Projects

### Purpose
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.

### Accomplishments

#### Period Ending March 31, 2016:
- **Recording SRM Business Process Procedures (BPPs):**
  - Reviewed, finalized, and published BPPs.
  - Completed mini-project.
- **Business Intelligence (BI) Reporting Enhancements:**
  - Completed development.
  - Completed and approved testing.
  - Approved new reporting tool for installation.

#### Planned Deliverables by June 30, 2016:
- **BI Reporting:**
  - Rollout new reporting tool to required users.
  - Complete training documentation.
  - Complete user training.
  - Complete mini-project.

#### Schedule Issue:
Project completion is 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

<table>
<thead>
<tr>
<th>7/01/2015</th>
<th>1/01/2016</th>
<th>6/30/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed Cost Accounting Prep Mini-Project</td>
<td>Completed BI Reporting Enhancements Mini Project</td>
<td></td>
</tr>
</tbody>
</table>

### Project Schedule Status Timeline

- **Total Project Budget:** $260 Thousand
- **Project Start:** 11/01/2015
- **Project End:** 02/29/2016
- **Expended:** 48%
- **Remaining:** 52%

---

Quarter Ending March 31, 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**

### Period Ending March 31, 2016:

- Continued basic issue cleansing related to Pension Solution’s first functional rollout.
- Continued analysis and prioritization of basic issues related to Pension Solution’s Functional Rollout 2.
- Continued to align Data Preparation activities with the Pension Solution’s Functional Rollout Plan.
- Completed data strategist’s initial policy approach and policy schedule deliverables.
- Continued complex data issues analysis and documented resulting decisions and policies.

### Planned Deliverables by June 30, 2016:

- Continue highest priority data cleaning activities related to the Pension Solution Functional Rollout 1.
- Continue analysis and prioritization of basic issues related to Pension Solution’s Functional Rollout 2.
- Continue to align Data Preparation activities with the Pension Solution’s Functional Rollout Plan.
- Continue complex data issues analysis and document resulting decisions and policies.
- Present Data Strategist recommendations to project sponsors and steering committee.

### Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Onboarded Data Strategist</th>
<th>Present Data Strategist Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter</td>
<td>7/01/2015</td>
<td>1st Quarter</td>
</tr>
<tr>
<td>2nd Quarter</td>
<td>1/01/2016</td>
<td>2nd Quarter</td>
</tr>
<tr>
<td>3rd Quarter</td>
<td>6/30/2016</td>
<td>3rd Quarter</td>
</tr>
<tr>
<td>4th Quarter</td>
<td>12/31/2016</td>
<td>4th Quarter</td>
</tr>
</tbody>
</table>

### Project Schedule Status Timeline

- **81% Complete**

- **Project Start** 1/11/2011
- **Project End** 12/31/2016
### Project Name
Develop RFP for SAP Managed Services

### Purpose
The Develop RFP for SAP Managed Services Project includes 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.

### Accomplishments

#### Period Ending March 31, 2016:
- Reviewed, finalized and released Request for Proposal (RFP) on Feb 29.
- 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 Mar 21.
- Project completed.

#### Planned Deliverables by June 30, 2016:
- Project complete.

#### Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>Document Repository</th>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>7/01/2015</td>
<td>1/01/2016</td>
<td>6/30/2016</td>
<td></td>
</tr>
</tbody>
</table>

#### Project Schedule Status Timeline

- Project Start: 11/1/2015
- Project End: 03/31/2016
- 100% Complete

### 2015/2016 Project Budget

<table>
<thead>
<tr>
<th>$200 Thousand</th>
</tr>
</thead>
</table>

- Expended
- Remaining

---

### Total Project Budget

<table>
<thead>
<tr>
<th>$200 Thousand</th>
</tr>
</thead>
</table>

- Expended
- Remaining

---

Quarter Ending March 31, 2016
### Project Name: 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.

### Period Ending March 31, 2016:
- Completed testing the corporate database enhancements to accommodate future rates.

### Planned Deliverables by June 30, 2016:
- Implement corporate database enhancements.
- Conduct lessons learned session.
- Complete project closeout activities.

### Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>2015/2016 Project Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Funding</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Project Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1.3 Million</td>
</tr>
</tbody>
</table>

### Project Schedule Status Timeline

- **Project Start**: 7/01/2014
- **Project End**: 6/30/2016
- **87% Complete**

- 32% Expended
- 68% Remaining
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.

**Period Ending March 31, 2016:**
- Completed monthly comprehensive status reports for Pension Solution, and Data Preparation.
- Monitored the Data Preparation Phase 1 cleansing activities.
- Monitored the Pension Solution project phases.
- Monitored adherence to the Pension Solution governance process.
- Developed board presentation regarding the status of the Pension Solution and related projects.
- On boarded new team members.

**Planned Deliverables by June 30, 2016:**
- Complete monthly comprehensive status reports for Pension Solution and Data Preparation.
- Monitor the Data Preparation Phase 1 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 related projects.

**2015/2016 Project Budget**
- $462 Thousand

<table>
<thead>
<tr>
<th></th>
<th>Expended</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>41%</strong></td>
<td>59%</td>
<td></td>
</tr>
</tbody>
</table>

**Total Project Budget**
- $6.2 Million

<table>
<thead>
<tr>
<th></th>
<th>Expended</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>43%</strong></td>
<td>57%</td>
<td></td>
</tr>
</tbody>
</table>

**Project Schedule Status Timeline**
- 56% Complete
- 09/1/2011 Project Start
- 10/9/2019 Project End
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.

Period Ending March 31, 2016:
- Developed and released Request for Proposal (RFP) for Phase 1 equipment and implementation services.
- Awarded Phase 1 contract to implementation vendor.
- Began Phase 1 construction preparation.
- Hosted Project kickoff meeting for Phase 1.

Planned Deliverables by June 30, 2016:
- Order Phase 1 audiovisual equipment.
- Complete Phase 2 construction documents, equipment list and Request for Proposal (RFP).
- Request and receive Enterprise Program Investment Council (EPIC) approval to extend project scope and budget to include Phase 2.
- Release Phase 2 RFP for bid.

Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/01/2015</td>
<td>10/1/2015</td>
<td>1/1/2016</td>
<td>6/30/2016</td>
</tr>
</tbody>
</table>

- Issued Phase 1 RFP
- Commenced Construction Preparation & Placed Equipment Order
- Accepted & Ranked Bids
- Award Contract
- Issue Phase 2 RFP
- 1st Quarter: 45% Complete

Project Schedule Status Timeline

11/01/2015 Project Start
09/30/2016 Project End

Total Project Budget
$2 Million

- Expended
- Remaining

0%

100%
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Purpose</th>
<th>Accomplishments</th>
</tr>
</thead>
</table>
| 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. | Period Ending March 31, 2016:  
- Refined project resource estimate for system enhancements to the corporate database, START, and myCalSTRS.  
- Refined implementation schedule and new project end date.  

Planned Deliverables by June 30, 2016:  
- Request and receive Enterprise Program Investment Council (EPIC) approval to extend the project schedule.  
- Complete Project Charter, schedule baseline, and project kick-off activities.  

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

Schedule Warning: Project is at risk due to delayed project start. The project will return to EPIC during the fourth quarter of fiscal year 2015/2016 to request a schedule extension.  

Major Fiscal Year 2015/2016 Milestones

<table>
<thead>
<tr>
<th>1st Quarter</th>
<th>2nd Quarter</th>
<th>3rd Quarter</th>
<th>4th Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/01/2015</td>
<td>1/01/2016</td>
<td>7/01/2015</td>
<td>6/30/2016</td>
</tr>
</tbody>
</table>

Project Schedule Status Timeline

<table>
<thead>
<tr>
<th>8/01/2015</th>
<th>5/31/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Start</td>
<td>Project End</td>
</tr>
</tbody>
</table>

70% Complete
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 is in its second phase to include conducting salary surveys, identifying minimum qualifications and preparing State Personnel Board materials.

**2015/2016 Project Budget**

**$61 Thousand**

**Period Ending March 31, 2016:**
- Finalized Pension Program classifications specifications.
- Finalized CalHR Board Item package.
- Completed project closeout activities.

**Planned Deliverables by June 30, 2016:**
- Project completed.

**Major Fiscal Year 2015/2016 Milestones**

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/01/2016</td>
<td>Finalized Pension Program classifications specifications.</td>
</tr>
<tr>
<td>1/01/2016</td>
<td>Finalized CalHR Board Item package.</td>
</tr>
<tr>
<td>6/30/2016</td>
<td>Completed project closeout activities.</td>
</tr>
</tbody>
</table>

**Project Schedule Status Timeline**

- 2/01/2014: Project Start
- 1/31/2016: Project End
- 100% Complete

**Total Project Budget**

**$204 Thousand**

- 36% Expended
- 64% Remaining

- 11% Expended
- 89% Remaining

Quarter Ending March 31, 2016
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.

Period Ending March 31, 2016:
- Finalized the Business Process Alignment document.
- Developed Functional Rollout Plan.
- Onboarded Independent Verification and Validation (IV&V) vendor.

Planned Deliverables by June 30, 2016:
- Finalize Conceptual Design Document including the functional and technical design specifications.
- Finalize Knowledge Transfer Plan.
- Conduct Interfaces and Bridging Joint Application Development work sessions.
- Commence data conversion activities.
- Complete selection process for Independent Security Assessment vendor.
- Release the BusinessDirect retrofit Request for Proposal.

Major Fiscal Year 2015/2016 Milestones

Project Schedule Status Timeline

*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.
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.

2015/2016 Program Budget
$1.2 Million

Total Program Budget
$7 Million

Period Ending March 31, 2016:
- Provided on-going project support.
- Provided on-going risk and issue management and vendor management for the Pension Solution project.
- Provided on-going change management support for Pension Solution and the Space Optimization project for the 5th Floor.
- Delivered change management training to technology leadership team.
- Utilized the change champion program to provide ongoing change support for internal stakeholders.
- Initiate plan for next series of readiness assessments.
- Provided ongoing support for employers.
- Conducted Employer Forums.

Planned Deliverables by June 30, 2016:
- Provide on-going change management support for Pension Solution and the final phase of the Space Optimization project for the 5th floor.
- Provide on-going risk and issue management and vendor management for the Pension Solution project.
- Utilize the change champion program to provide ongoing change support for internal stakeholders.
- Develop plan for next series of readiness assessments.
- Provide ongoing support for employers.
- Conduct Employer Forums.

Major Fiscal Year 2015/2016 Milestones

Completed Baseline Readiness Assessment Reports

- Expended
- Remaining

Quarter Ending March 31, 2016
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Purpose</th>
<th>Accomplishments</th>
</tr>
</thead>
</table>
| 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 will also further utilize the tool for test and release management. | **Period Ending March 31, 2016:**  
- Completed working sessions for test and release management.  
- Completed configuration design for test and release management.  
- Initiated testing of the configuration design for test and release management.  

**Planned Deliverables by June 30, 2016:**  
- Complete test and release management testing deployment.  
- Complete test and release management training and transition.  
- Complete project closeout activities.  

**Major Fiscal Year 2015/2016 Milestones**  

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Milestone</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter</td>
<td>Completed Test &amp; Release Management Configuration Design</td>
<td>Complete Deployments</td>
<td>6/30/2016</td>
</tr>
<tr>
<td>2nd Quarter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3rd Quarter</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4th Quarter</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**2015/2016 Project Budget**  
$447 Thousand  
- Expended  
- Remaining  

**Total Project Budget**  
$1.1 Million  
- Expended  
- Remaining  

**Project Schedule Status Timeline**  

- 08/1/2011 Project Start  
- 6/30/2016 Complete
**Project Name**  
Space Optimization

The Space Optimization project will optimize workspace throughout the building in order to provide growth for current business needs and the expected long-term growth. The current scope and schedule represents the 5th floor optimization activities.

**Project Name**  
Space Optimization

**Purpose**

The Space Optimization project will optimize workspace throughout the building in order to provide growth for current business needs and the expected long-term growth. The current scope and schedule represents the 5th floor optimization activities.

**Accomplishments**

**2015/2016 Project Budget**

$1.9 Million

- Expended
- Remaining

![Pie chart for 2015/2016 Project Budget]

**Total Project Budget**

$1.9 Million

- Expended
- Remaining

![Pie chart for Total Project Budget]

**Period Ending March 31, 2016:**

- Completed first three (3) phases of the 5th floor space optimization effort.
- Executed communication and change management activities.

**Planned Deliverables by June 30, 2016:**

- Complete phase 4 of the 5th floor space optimization effort.
- Complete project close-out activities for the 5th floor space optimization effort.
- Request and receive Enterprise Program Investment Council (EPIC) approval to extend the scope and schedule to include space optimization activities for floors 9, 11 and 12.

**Major Fiscal Year 2015/2016 Milestones**

<table>
<thead>
<tr>
<th>Date</th>
<th>Milestone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/01/2016</td>
<td>1st Quarter Completed Phase 1</td>
</tr>
<tr>
<td>1/01/2016</td>
<td>2nd Quarter Completed Phase 2</td>
</tr>
<tr>
<td>1/01/2016</td>
<td>3rd Quarter Completed Phase 3</td>
</tr>
<tr>
<td>1/01/2016</td>
<td>4th Quarter Request Scope and Schedule Increase</td>
</tr>
<tr>
<td>4/30/2016</td>
<td>Project End 71% Complete</td>
</tr>
<tr>
<td>6/30/2016</td>
<td>Project End 100% Expended</td>
</tr>
</tbody>
</table>

**Project Schedule Status Timeline**

![Timeline diagram showing project progress from 11/01/2015 to 04/30/2016]