
CALSTRS

Enterprise Projects Fiscal Year 2010/2011 Third Quarter Report

Enterprise Projects

Fiscal Year 2010/2011 – Second 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

Ed Derman
Deputy Chief Executive Officer
Plan Design and Communication

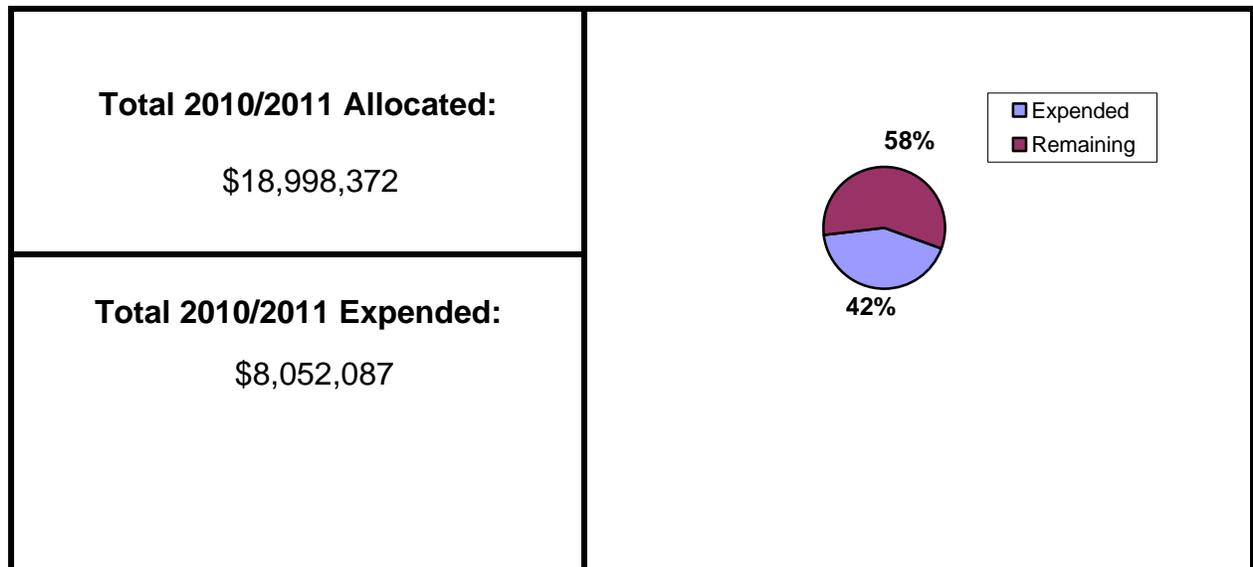
Peggy Plett
Deputy Chief Executive Officer
Benefits and Services

Janice Hanson
Deputy Chief Executive Officer
Enterprise Initiatives and Technology

Robin Madsen
Chief Financial Officer

Total Enterprise Projects' 2010/2011 Budget: \$20 Million

As of March 31, 2011



Enterprise Projects

Fiscal Year 2010/2011 – Third Quarter

Project Name	Duration	Project Total ¹	2010/2011 Budget	2010/2011 Expended ²	Schedule	Budget
Actuarial Valuation	Apr 08 – Jun 11	\$1,849,148	\$223,275	\$35,894	 ³	●
Annual Update	Jun 10 – Jun 11	\$109,824	\$109,824	\$43,789	●	●
Board Elections	Nov 10 – Mar 12	\$48,000	\$21,120	\$7,755	●	●
Cost Effectiveness Measurement	Jul 10 – Jun 11	\$28,800	\$28,800	\$25,941	●	●
Future State Architecture	Jul 07 – Jan 11	\$2,096,694	\$474,503	\$474,503		
Investment Accounting ⁴	Oct 08 – Dec 11	\$2,980,000	\$1,220,000	\$0	●	●
Member Service Center Discovery	Oct 10 – Apr 11	\$259,307	\$259,307	\$239,920		
MyCalSTRS Online Services for Teachers ⁴	Jan 09 – Dec 11	\$2,078,816	\$2,035,650	\$1,489,536	●	●
Penalties and Interest	Dec 09 – Jun 12	\$12,125,500	\$8,455,100	\$2,578,447	●	●
Pension Accounting Initiative	May 08 – Jul 12	\$6,372,839	\$3,198,600	\$1,827,845	●	●
Reduce Files	Mar 08 – Dec 10	\$7,986,383	\$636,973	\$560,200		
Renew Corporate Accounting & Resource Management	Feb 11 – Aug 13	\$16,200,000 ⁵	\$1,800,000 ⁵	\$25,915 ⁵	 ⁶	●
Renew Pension Discovery	Dec 10 – Feb 12	\$1,410,200	\$473,660	\$46,100	 ⁷	●
Renew Project Support	Jan 11 – Jun 13	\$1,934,700	\$567,300	\$37,532	●	●
Project Management Office Program	Ongoing	\$794,260	\$794,260	\$535,975	N/A	●
Project Risk Reserve	Ongoing	\$500,000	\$500,000	\$148,650	N/A	●
Total Enterprise Projects' 2010/2011 Budget:		Total 2010/2011 Allocated:		Total 2010/2011 Expended:		
\$20 Million		\$18,998,372		\$8,052,087		

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 2010/2011 Expended – includes project expenses paid and does not reflect expenses that have been accrued

³ Actuarial Valuation – schedule warning due to resource availability

⁴ Investment Accounting and myCalSTRS Online Services for Teachers – projects initiated with contingency funding and received subsequent EPIC funding. The amount displayed above reflects EPIC funding only

⁵ Renew Corporate Accounting & Resource Management – funded through Board and contingency funds and is excluded in the Enterprise Projects' stated Budget, Allocated or Expended totals information. The project received \$389,070 of the \$1.8 million budget amount for fiscal year 2010/2011.

⁶ Renew Corporate Accounting & Resource Management – schedule warning due to delayed procurement process

⁷ Renew Pension Discovery – schedule warning due to delay in Request for Proposal release

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, 2011:

- Completed revision to the risk assessment document.
- Completed server environment implementation and application upgrade.
- Completed testing of functionality for remaining standard reports.

Planned Deliverables by June 30, 2011:

- Test and implement Data Validation Screen components.
- Implement functionality for remaining standard reports.
- Test and implement ad-hoc reports.
- Complete training and transition to program.

Board Strategic Fit

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

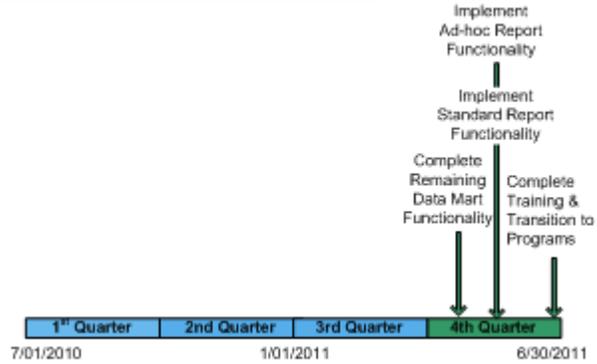
Objective D: **Identify and eliminate internal and external data integrity problems.**

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

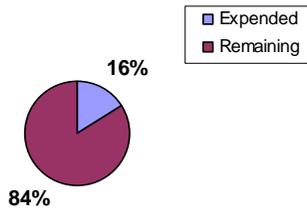
Objective F: **Identify and improve the efficiency of CalSTRS business.**

Schedule Warning: Project is behind schedule due to the need to procure process review actuary services to complete the detailed procedures report.

Major Fiscal Year 2010/2011 Milestones



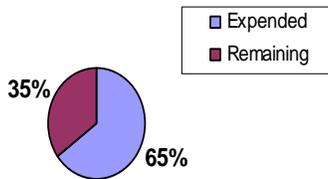
2010/2011 Project Budget
\$223 Thousand



Project Schedule Status Timeline



Total Project Budget
\$1.8 Million



Project Name	Purpose	Accomplishments
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Annual Update

Annual Update is the process that creates and distributes the annual member Retirement Progress Reports.

Period Ending March 31, 2011:

- Completed 2009/2010 Annual Update project close-out report.
- Conducted Lessons Learned session with print vendor.
- Obtained approval of 2010/2011 Annual Update Project Charter.
- Defined 2010/2011 Retirement Progress Report enhancements.

Key Operational Initiative

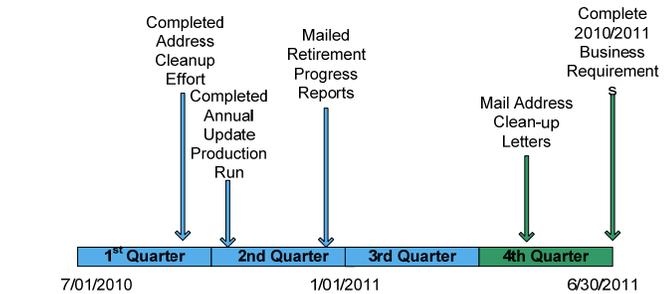
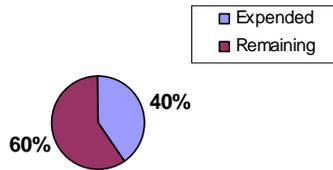
Teachers' Retirement Law requires individual account statements to be provided to each active and inactive member at least annually.

Planned Deliverables by June 30, 2011:

- Complete business requirements for the 2010/2011 Retirement Progress Report enhancements.
- Create and mail 22,000 letters for member confirmation of a new US Postal Service provided address.

Major Fiscal Year 2010/2011 Milestones

**2010/2011 Project Budget
\$110 Thousand**



Project Schedule Status Timeline



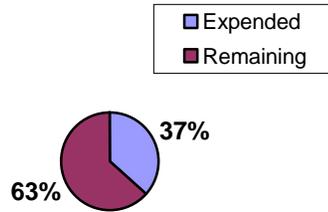
Board Elections

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.

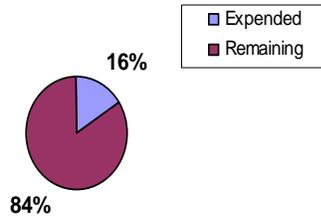
Key Operational Initiative

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

**2010/2011 Project Budget
\$21 Thousand**



**Total Project Budget
\$48 Thousand**



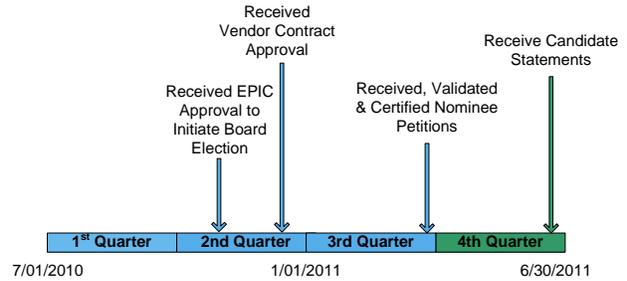
Period Ending March 31, 2011:

- Reviewed, updated and approved functional specifications.
- Received, reviewed and validated candidate nominations.
- Certified candidate signatures for CalSTRS respective Board seats.
- Published candidate names for the three 2011 Board Election positions on CalSTRS web site.

Planned Deliverables by June 30, 2011:

- Begin testing address data files.
- Receive, prepare and submit candidate statements to vendor.

Major Fiscal Year 2010/2011 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.

Board Strategic Fit

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

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

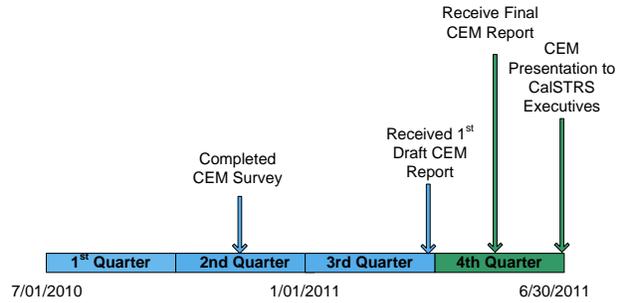
Period Ending March 31, 2011:

- Received 2009/2010 Cost Effectiveness Measurement (CEM) Defined Benefit Benchmarking Survey Analysis Draft Report.
- Completed first draft of project close-out report.

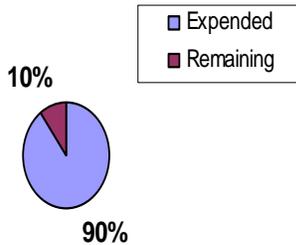
Planned Deliverables by June 30, 2011:

- Review and deliver final comments to CEM for the 2009/2010 Defined Benefit Benchmarking Survey Analysis Draft Report.
- Prepare for 2010 CEM presentation to Leadership Team.
- Finalize project close-out report.

Major Fiscal Year 2010/2011 Milestones



2010/2011 Project Budget \$29 Thousand



Project Schedule Status Timeline



Future State Architecture

The Future State Architecture Project will deliver the Solutions Framework and Implementation Roadmap to assist the organization in moving forward to its Future State as defined in the CalSTRS Strategic Plans.

Board Strategic Fit

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

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

Period Ending March 31, 2011:

- Completed project close-out report.

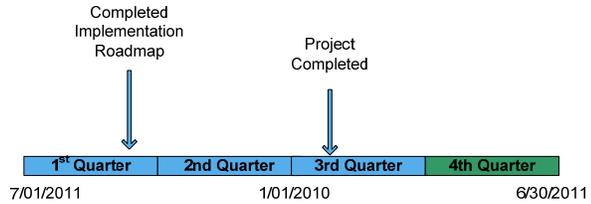
Planned Deliverables by June 30, 2011:

- Project is complete.

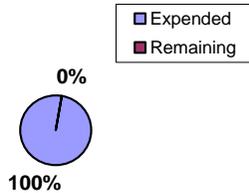
Total Project Cost: Project was completed under budget by \$316,000. These funds were returned to the Enterprise Program Investment Council (EPIC) budget.

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

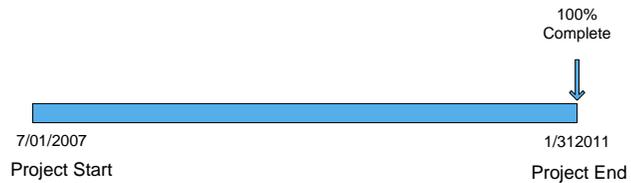
Major Fiscal Year 2010/2011 Milestones



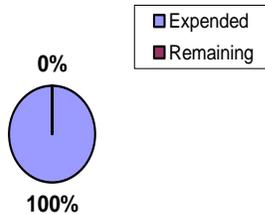
2010/2011 Project Budget
\$475 Thousand



Project Schedule Status Timeline



Total Project Budget
\$1.7 Million



Investment Accounting

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

Board Strategic Fit

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

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

Period Ending March 31, 2011:

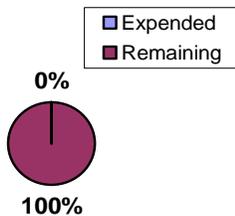
- Initiated development of complex securities analyses and documentation across all investment types.
- Initiated development of templates for oversight activities.
- Determined financial statement presentation recommendation for investments for the year ending June 30, 2011.
- Initiated preparations for 2010/2011 fair valuation activities.

Planned Deliverables by June 30, 2011:

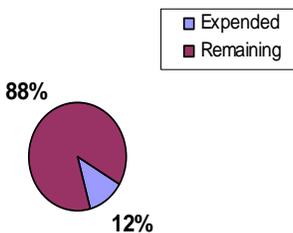
- Complete testing and implementation of templates for oversight activities.
- Initiate Operations Stage of the project.
- Update fair value fact sheets and create fact sheets for new investments.
- Review and substantially finalize complex securities memorandums for all investments.
- Develop recommendation for long term solutions to general ledger mapping issues and expanded chart of accounts for investments and investment activities.

Note: The project was initiated in October 2008, with a total of \$1,250,000 in contingency funds divided equally between fiscal years 2008/2009 and 2009/2010, and received Enterprise Program Investment Council (EPIC) funding beginning in January 2010. All of the 2009/2010 contingency funds and \$389,264 of the 2009/2010 EPIC funds have been expended.

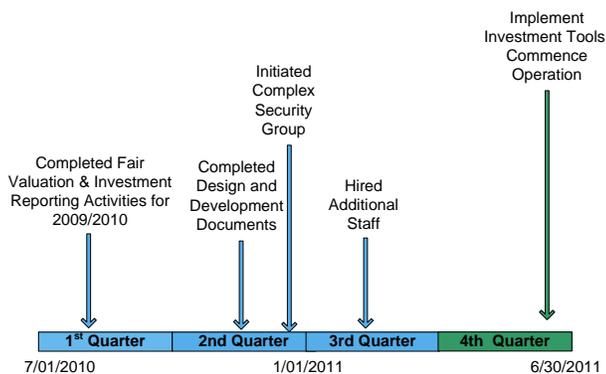
2010/2011 Project Budget \$1.2 Million



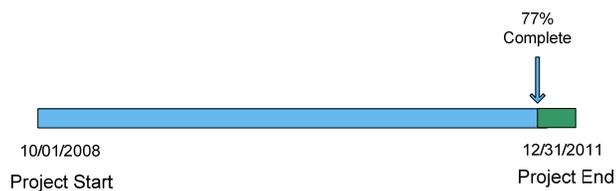
Total Project Budget \$3.2 Million



Major Fiscal Year 2010/2011 Milestones



Project Schedule Status Timeline



Member Service Center Discovery

The Member Service Center Discovery effort will identify and document business requirements for establishing five CalSTRS Member Service Centers (MSC) statewide with the first opening in Southern California.

Board Strategic Fit

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

Objective C: Explore the pros and cons for having branch offices to enhance customer service.

Period Ending March 31, 2011:

- Defined Facility and Infrastructure requirements for a Member Service Center site.
- Defined the Technology and Telecommunication requirements for a Member Service Center site.
- Conducted Best Practices Research.
- Determined optimal Los Angeles office site is 505 N Brand Blvd, Glendale based on demographics.
- Completed and presented Discovery Results document to Enterprise Program Investment Council (EPIC).

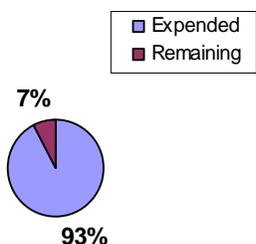
Planned Deliverables by June 30, 2011:

- None - Project Discovery is complete and implementation effort will be managed in the program areas.

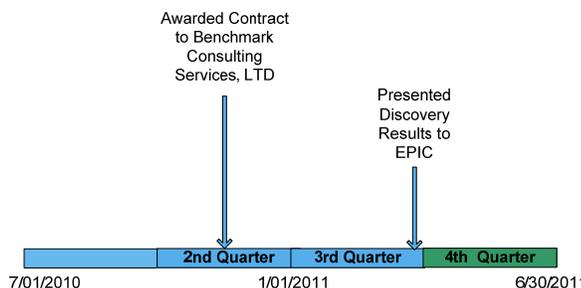
Total Project Cost: Project was completed under budget.

Schedule and Scope: Project was completed within the approved scope and one month ahead of schedule.

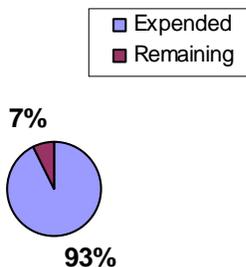
2010/2011 Project Budget
\$259 Thousand



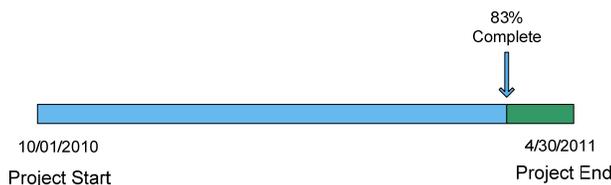
Major Fiscal Year 2010/2011 Milestones



Total Project Budget
\$259 Thousand



Project Schedule Status Timeline



myCalSTRS Online Services for Teachers (MOST)

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

Board Strategic Fit

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

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

Period Ending March 31, 2011:

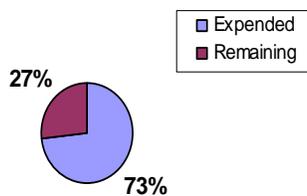
- Implemented the on-line submit Death Beneficiary form.
- Implemented the on-line Death Notification process.
- Completed the development for the on-line Refund, Pre-election of an Option and Service Retirement applications.
- Received Enterprise Program Investment Council (EPIC) approval to extend project schedule by six months and increase budget by \$19,080 to conduct project close-out activities.
- Since July 2010:
 - Registered 118,000 members through on-line and alternate registration processes
 - Enrolled 3,163 members for direct deposit; updated 13,464 member addresses, and 5,254 members' tax withholding information
 - Received 6,361 on-line Death Beneficiary forms
 - Received 182 on-line Verification of Benefits requests
 - Completed 381 on-line Service Credit forms

Planned Deliverables by June 30, 2011:

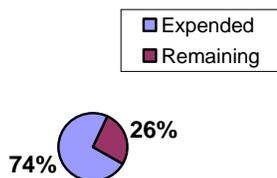
- Complete user testing and implement the final project system release to include the on-line Refund, Service Retirement and Pre-election of an Option applications and the viewing account balances functionality.

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.

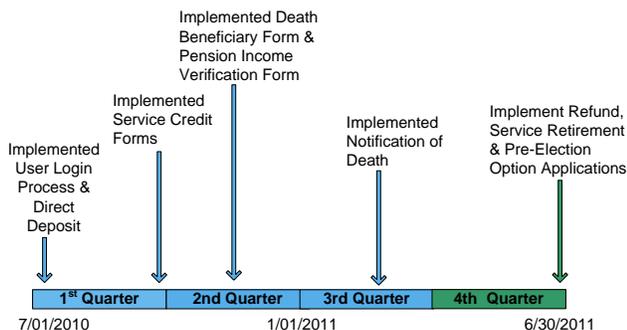
2010/2011 Project Budget \$2 Million



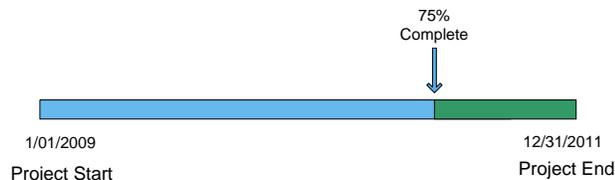
Total Project Budget \$2.1 Million



Major Fiscal Year 2010/2011 Milestones



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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Penalties and Interest

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

Board Strategic Fit

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

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

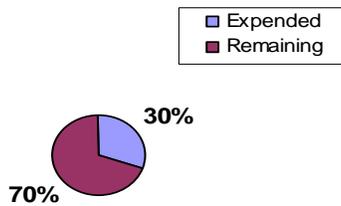
Period Ending March 31, 2011:

- Finalized Conceptual Solution Design (Blueprint).
- Developed change management strategy and completed initial change management tasks.
- Developed training strategy.
- Completed 75% of the Functional Specifications for non-standard SAP functionality.
- Initiated configuration and unit testing of the fourteen business work streams.
- Extended the system go-live date from July, 5, 2011 to August 15, 2011 to accommodate changes to the original requirements and ensure sufficient time is available for thorough testing.

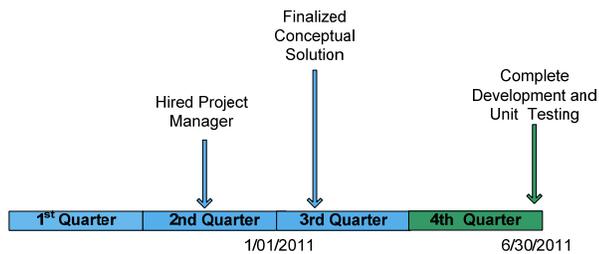
Planned Deliverables by June 30, 2011:

- Complete the configuration and unit testing of all business work streams.
- Complete Functional and Technical Specifications for non-standard SAP functionality.
- Complete Business Process Procedures.
- Complete all system development and unit testing activities.
- Conduct the first integration test cycle (IT1).
- Conduct system prototype demonstration with the employer pilot team.

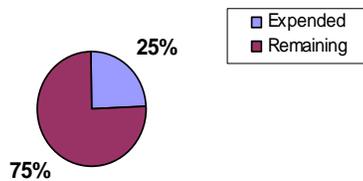
2010/2011 Project Budget
\$8.5 Million



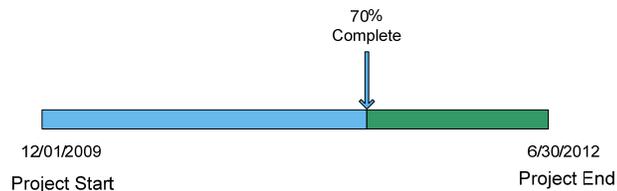
Major Fiscal Year 2010/2011 Milestones



Total Project Budget
\$12.1 Million



Project Schedule Status Timeline



Pension Accounting Initiative

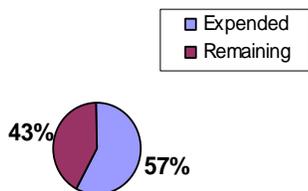
The Pension Accounting Initiative will improve internal controls by addressing gaps between current and best practices in accounting policy, planning, treatment, chart of accounts, analysis, availability of financial information, use of the general ledger, communication of fiscal impacts, and training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

Board Strategic Fit

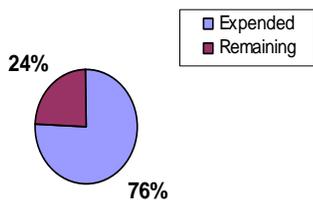
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

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

2010/2011 Project Budget
\$3.2 Million



Total Project Budget
\$6.4 Million



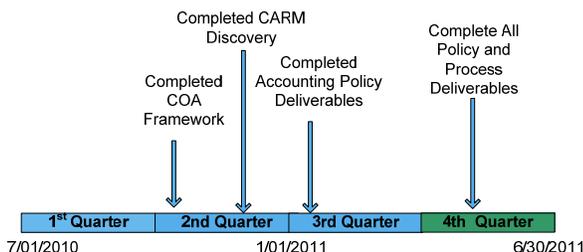
Period Ending March 31, 2011:

- Finalized Chart of Accounts Framework including a prototype and overview report in preparation for the Corporate Accounting and Resource Management System.
- Completed development of policies necessary to strengthen organizational internal controls.
- Finalized the Corporate Accounting & Resource Management (CARM) System Discovery Report as follow up to the Enterprise Program Investment Council (EPIC) presentation.
- Began the skills, knowledge, and abilities gap analysis between those included in the current classifications for Accounting personnel and those required to complete the analytical and technical duties identified or confirmed during the project.
- Began drafting Key Performance Indicators (KPIs) for the Benefit Payments and Disbursements as well as Collections and Receivables processes.
- Began documenting the as-is cash flow process including the identification of key control points.
- Received Enterprise Program Investment Council (EPIC) approval to increase the project schedule through June 2012 to ensure vendor support throughout the State's personnel process for the accounting classification efforts.

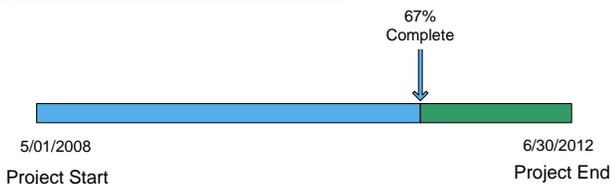
Planned Deliverables by June 30, 2011:

- Complete Key Performance Indicators (KPIs) pertaining to the Benefit Payment and Distribution process and the Collections and Receivables process.
- Complete deliverables with recommendations to improve cash management and control including the as-is cash flow process.
- Complete the Accounting Classification Specifications Proposal Request Packet.
- Complete all policy and process deliverables.
- Develop implementation schedule for key process changes and internal controls improvements.

Major Fiscal Year 2010/2011 Milestones



Project Schedule Status Timeline



Reduce Files

The Reduce Files project will convert non-member paper, microfilm and microfiche files to electronic format to reduce storage space requirements. This will decrease the number of filing cabinets throughout CalSTRS and contribute to the New Headquarters facility's LEED Gold Certification for sustainable "green" construction. The project also includes implementing a Records Management Program to ensure proper ongoing record maintenance.

Period Ending March 31, 2011:

- Completed project close-out report.

Planned Deliverables by June 30, 2011:

- Project is complete.

Total Project Cost: Project was completed within budget.

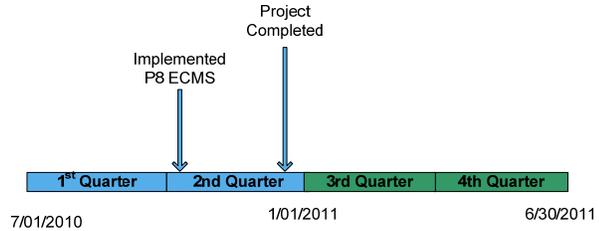
Schedule and Scope: Project was completed within the approved schedule and scope.

Major Fiscal Year 2010/2011 Milestones

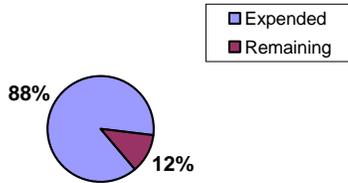
Board Strategic Fit

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

Objective D: *Design policies and practices to address the distribution and retention of electronic records.*



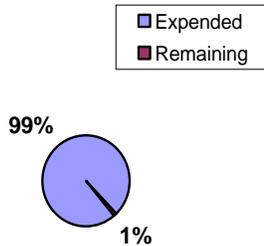
2010/2011 Project Budget
\$637 Thousand



Project Schedule Status Timeline



Total Project Budget
\$8 Million



Project Name	Purpose	Accomplishments
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Renew Corporate Accounting & Resource Management

The Renew Corporate Accounting and Resource Management (CARM) project will reduce risk, provide accurate and timely financial services information, and modernize CalSTRS financial services, systems and ways of doing business through enhanced business processes and the implementation of SAP functionality.

Board Strategic Fit

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

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

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

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

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

Period Ending March 31, 2011:

- Amended existing vendor contract for Penalties and Interest project management services to also support the Corporate Accounting and Resource Management project as provided for in contract.
- Released draft vendor Request for Information for Systems Integration and Application Maintenance Support to Penalties and Interest vendor as provided for in the current contract.
- Refined Functional and Non-Functional Requirements.
- Conducted In-depth question and answer Session with vendor.

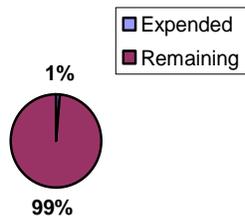
Planned Deliverables by June 30, 2011:

- Release Final Vendor Request for Information for Systems Integration and Application Maintenance Support to Penalties and Interest vendor as provided for in the current contract.
- Release Final Functional and Non-Functional Requirements.
- Conduct vendor presentations and demonstrations.
- Perform key personnel reference checks.
- Finalize vendor selection.
- Request and receive Board approval of vendor contract.
- Finalize project back-fill staffing needs.

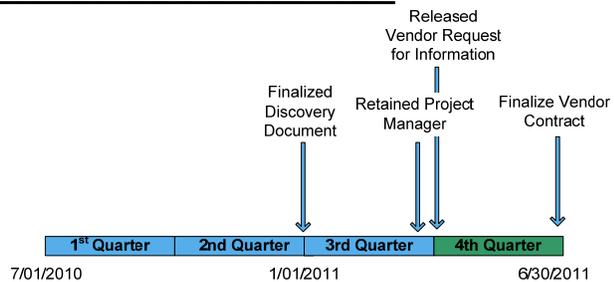
Schedule Warning: Project is behind schedule due to the Request For Information process taking longer than anticipated and the level of complexity of the procurement.

Note: Project is funded from Board and contingency funds and does not currently utilize Enterprise Program Investment Council funding. The project received \$389,070 of the \$1.8 million budget amount for fiscal year 2010/2011.

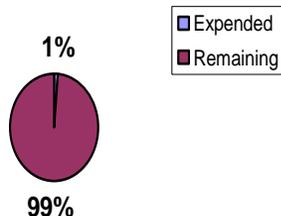
2010/2011 Project Budget \$1.8 Million



Major Fiscal Year 2010/2011 Milestones



Total Project Budget \$16.2 Million



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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Renew Pension Discovery

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

Board Strategic Fit

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

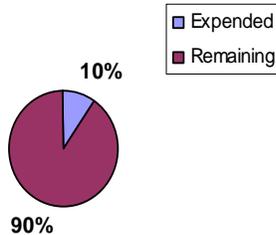
Objective D: Identify and eliminate internal and external data integrity problems.

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

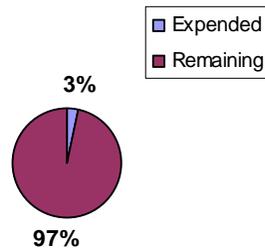
Objective E: Enhance the scope and quality of internal controls, internal audits and external audits.

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

2010/2011 Project Budget
\$474 Thousand



Total Project Budget
\$1.4 Million



Period Ending March 31, 2011:

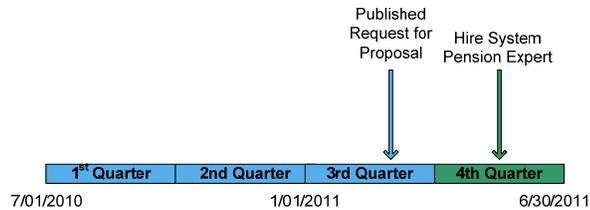
- Gained Sponsor approval of the Project Charter.
- Completed on-board training for all Pension Discovery Team members.
- Published Request for Proposal for Pension System Expert.
- Completed working sessions with Pension Discovery Team to develop the pension-related unclear and/or inconsistent business practices draft report.

Planned Deliverables by June 30, 2011:

- Complete the pension system expert technical proposal evaluations.
- Conduct vendor presentations and perform key personnel reference checks.
- Finalize vendor selection; execute contract and on-board pension system expert.

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

Major Fiscal Year 2010/2011 Milestones



Project Schedule Status Timeline



Renew 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, 2011:

- Developed draft Renew Communications and Change Management plans.
- Established Renew steering committee.
- Developed draft Renew governance model.

Planned Deliverables by June 30, 2011:

- Finalize independent project oversight vendor services contract.
- Finalize external legal service firm contract.
- Finalize Renew Communications and Change Management plans.
- Finalize Renew governance model.

Board Strategic Fit

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

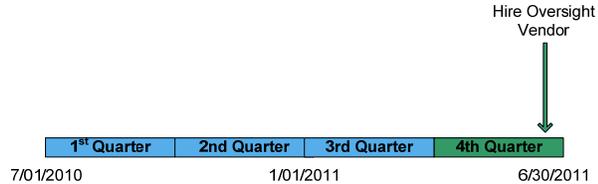
Objective D: Identify and eliminate internal and external data integrity problems.

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

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

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

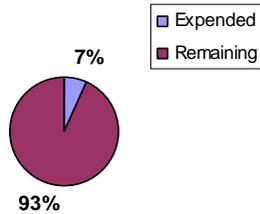
Major Fiscal Year 2010/2011 Milestones



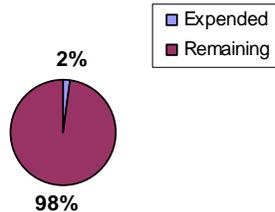
Project Schedule Status Timeline



2010/2011 Project Budget
\$567 Thousand



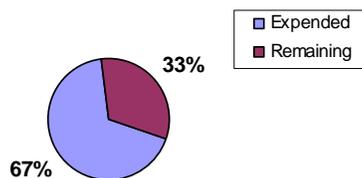
Total Project Budget
\$1.9 Million



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.

2010/2011 Project Budget
\$794 Thousand



Period Ending March 31, 2011:

- Provided direction for one project (myCalSTRS Online Services for Teachers) requesting a schedule extension and budget increase.
- Provided direction for one project (Pension Accounting Initiative) requesting a schedule extension.
- Provided direction to one business area preparing and submitting for Enterprise Program Investment Council (EPIC) approval of a business case for an Anti-Spiking discovery effort.
- Provided oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.
- Provided Enterprise Program Investment Council (EPIC) with the results of one post implementation evaluation report (PIER) for Community Colleges – AB1586.
- Drafted one post implementation evaluation report (PIER) for the Accounting Reengineering project.
- Initiated one post implementation evaluation report (PIER) for the Data Integrity project.
- Developed Priority Management assessment and scoring model for review and approval.
- Completed data collection in support of the Priority Management assessment process.

Planned Deliverables by June 30, 2011:

- Provide direction for business areas developing business cases or projects requesting a schedule extension, budget increase or scope modification.
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for twelve enterprise projects/discovery efforts.
- Finalize and provide Enterprise Program Investment Council (EPIC) with the results of one post implementation evaluation report (PIER) for the Accounting Reengineering project.
- Draft one post implementation evaluation report (PIER) for the Data Integrity project for review.
- Provide a Project Express workshop series to CalSTRS staff on project management processes and templates.
- Finalize and receive approval of Priority Management project charter.
- Obtain final approval of Priority Management assessment and scoring model.
- Designate and train Project Review Board members for their role in Priority Management.