

CALSTRS

HOW WILL YOU SPEND YOUR FUTURE?

California State Teachers'
Retirement System
Post Office Box 15275
Sacramento, CA 95851-0275

916.414.2200 Tel
www.calstrs.com

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July 1, 2010

The Honorable Denise Moreno Ducheny, Chair
Senate Budget and Fiscal Review Committee
State Capitol, Room 5019
Sacramento, CA 95814

Ex Officio Members

State Controller

John Chiang

Director of Finance

Ana Matosantos

State Treasurer

Bill Lockyer

Superintendent of

Public Instruction

Jack O'Connell

RE: Quarterly Enterprise Projects Report

Dear Senator Ducheny:

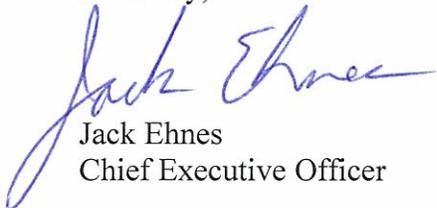
Pursuant to Section 2, Item 1920-001-0835, of the Annual Budget Act, enclosed is a copy of the Quarterly Enterprise Projects Report. As required, the report is being submitted to the Joint Legislative Budget Committee, the fiscal committees of the Legislature and the State Chief Information Officer.

The Quarterly Enterprise Projects Report summarizes the status of the California State Teachers' Retirement System (CalSTRS) enterprise projects, as of the third quarter of Fiscal Year (FY) 2009-10. It represents all identified enterprise projects including information technology projects.

CalSTRS Annual Budget for enterprise projects is \$20 million. A total of \$16.3 million is allocated for the current fiscal year, and a total of \$7.6 million has been expended as of the third quarter of Fiscal Year (FY) 2009-10.

If you have any questions, or need additional information, please contact our Project Management Office Director, Chris Caietti, at (916) 414-6800. This report is available on CalSTRS' public Web site at http://www.calstrs.com/Help/forms_publications/pubs.aspx, Current Publications under the Legislative, Legal section. For a printed copy of this report, please contact Wendy Hughey at (916) 414-1994.

Sincerely,



Jack Ehnes
Chief Executive Officer

Attachment

CALSTRS

Enterprise Projects Fiscal Year 2009/2010 Third Quarter Report

Enterprise Projects

Fiscal Year 2009/2010 - Third Quarter Report

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

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

Enterprise Program Investment Council Members

Christine Ford
Chief of Staff

Ed Derman
Deputy Chief Executive Officer
Plan Design and Communication

Peggy Plett
Deputy Chief Executive Officer
Benefits and Services

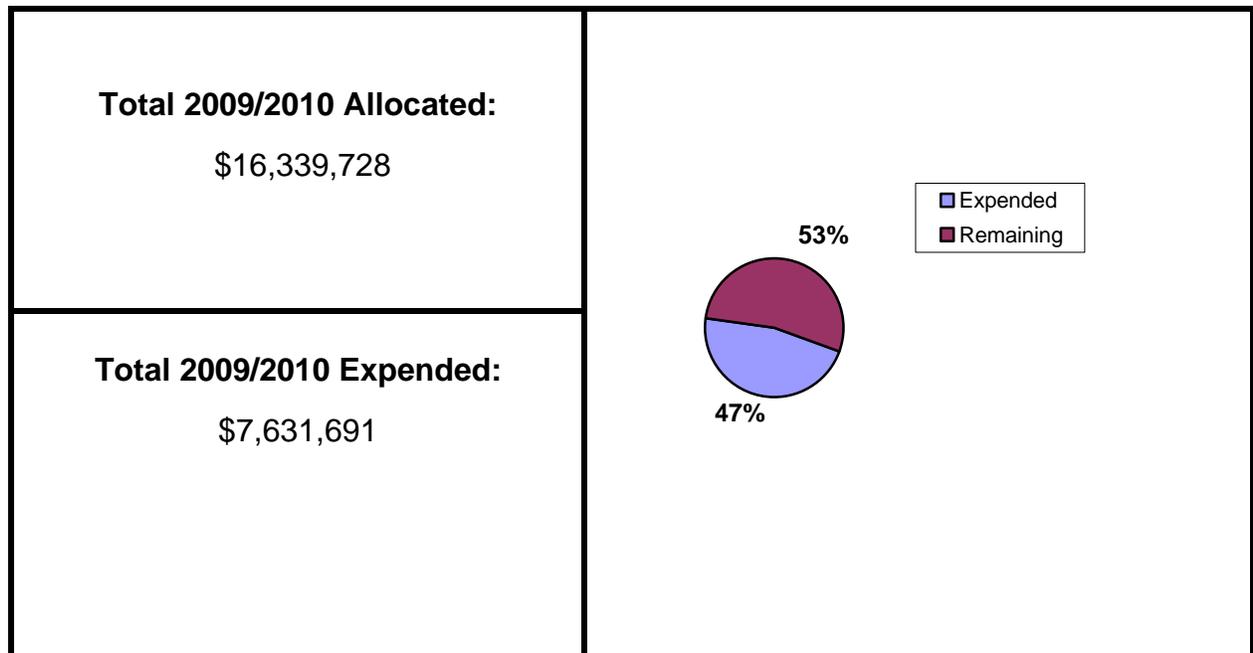
Janice Hanson
Deputy Chief Executive Officer
Enterprise Initiatives and Technology

Robin Madsen
Interim Chief Financial Officer

Brian Bartow
Acting General Counsel

Total Enterprise Projects' 2009/2010 Budget: \$20 Million

As of March 31, 2010



Enterprise Projects

Fiscal Year 2009/2010 - Third Quarter

Project Name	Duration	Project Total ¹	2009/2010 Budget	2009/2010 Expended	Schedule	Budget
Actuarial Valuation ²	Apr 08 – Jul 10	\$1,857,340	\$912,010	\$235,365		
Additional Earnings and Annuity Credit	Feb 08 – Jan 10	\$1,232,017	\$141,402	\$132,580		
Annual Update ³	Jun 09 – Jun 10	\$120,888	\$120,888	\$59,328		
Cost Effectiveness Measurement	Jul 09 – Jun 0	\$50,880	\$50,880	\$16,560		
Continuous Improvement Team 'Proof of Concept'	Oct 05 – Jun 10	\$1,955,235	\$812,000	\$587,957		
Employer Reporting	Jul 05 – Jun 10	\$11,307,059	\$2,064,186	\$1,333,224		
Future State Architecture	Jul 07 – Jun 1	\$1,873,087	\$1,183,549	\$447,215		
Headquarter Facility	Apr 06 – Feb	\$2,318,564	\$353,659	\$295,156		
Hosted Contact Center ⁴	Feb 10 – Jun 10	\$72,640	\$72,640	\$23,008		
Human Resource Management Information System ⁵	Oct 06 – Sep 10	\$1,743,842	\$959,471	\$241,700		
Investment Accounting	Oct 08 – Dec 11	\$4,179,000	\$933,000	\$0		
MyCalSTRS Online Services for Teachers	Jan 09 – Apr 11	\$1,730,000	\$445,000	\$42,982		
Penalties and Interest	Dec 09 – Oct 11	\$6,000,000	\$700,000	\$4,776		
Pension Accounting Initiative	May 08 – Apr 11	\$6,561,768	\$1,955,031	\$978,608		
Reduce Files ⁶	Mar 08 – Jun 10	\$8,409,931	\$4,163,727	\$2,189,491		
Project Management Office Program	Ongoing	\$1,163,006	\$1,163,006	\$852,817	N/A	
Project Risk Reserve	Ongoing	\$500,000	\$500,000	\$190,924	N/A	

Total Enterprise Projects' 2009/2010 Budget: \$20 million	Total 2009/2010 Allocated: \$16,339,728	Total 2009/2010 Expended: \$7,631,691
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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 Actuarial Valuation - impacts of furloughs and extensive testing activities

³ Annual Update – increased risk due to loss of critical resource

⁴ Hosted Contact Center – system stability issues

⁵ Human Resource Management Information Systems – cancellation of the Request for Proposal (RFP)

⁶ Reduce Files – increased time required to complete implementation

Project Name Purpose Accomplishments

Actuarial Valuation

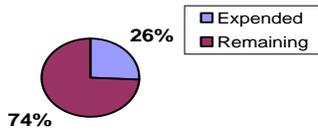
The Actuarial Valuation project will provide CalSTRS with verification of the actuarial valuation processes, improve the current valuation process through the use of both technology and process improvement, and create detailed Actuarial Resources procedures.

Strategic Fit

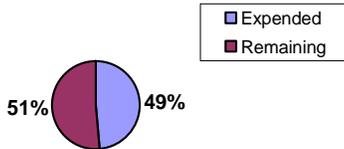
Goal: *Financial (Risk and Reward)*

Objective: **Responsibly Manage Risk**

2009/2010 Project Budget
\$912 Thousand



Total Project Budget
\$1.9 Million



Period Ending March 31, 2010:

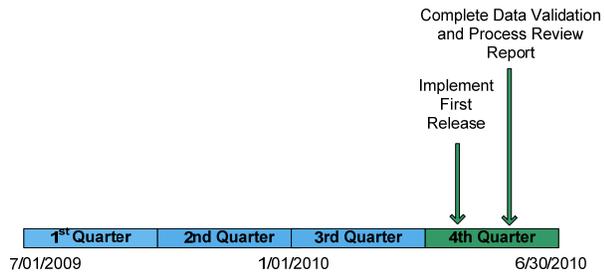
- Continued testing of the Actuarial Data Mart, high-priority standard actuarial reports.
- Received and provided feedback on the updated draft Data Validation and Process Review Report produced by the Process Review Actuary vendor.

Planned Deliverables by June 30, 2010:

- Request Enterprise Program Investment Council (EPIC) approval to extend project schedule due to furloughs and extensive testing activities.
- Complete testing and implementation activities for the Actuarial Data Mart, high-priority standard actuarial reports.
- Finalize, review and approve Data Validation and Process Review Report produced by the Process Review Actuary vendor.

Schedule Warning: The Actuarial Valuation project is in warning status due to impacts of furloughs, extensive testing and additional time required by the technical services vendor and process review actuary vendor to complete deliverables.

Major Fiscal Year 2009/2010 Milestones



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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Additional Earnings & Annuity Credit

The Additional Earnings & Annuity Credit Project will distribute payments and credits to eligible members.

Period Ending March 31, 2010:

- Monitored 2009 1099's for the Additional Earnings/Additional Annuity credits.
- Completed Project Closeout Report.
- Completed Lessons Learned Report.

Strategic Fit

CalSTRS Board declaration for Additional Earnings & Annuity Credit at June 2007 Board Meeting

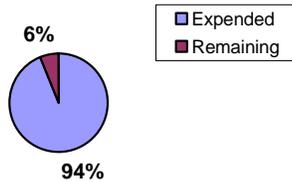
Planned Deliverables by June 30, 2010:

- Project is complete.

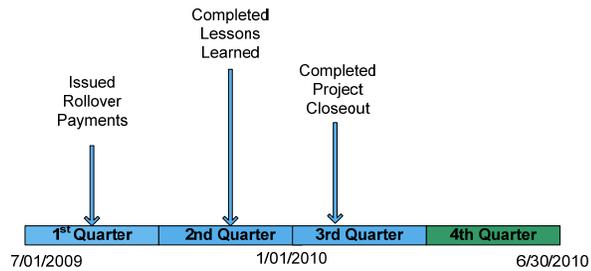
Total Project Cost: Project was completed within budget.

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

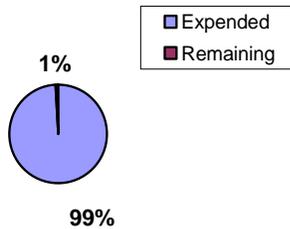
**2009/2010 Project Budget
\$141 Thousand**



Major Fiscal Year 2009/2010 Milestones



**Total Project Budget
\$1.2 Million**



Project Schedule Status Timeline



Annual Update

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

Period Ending March 31, 2010:

- Conducted 2008/2009 Lessons Learned sessions with business staff, technical staff and Direct Mail Express (DME) vendor.
- Identified 2009/2010 Annual Update project scope.

Planned Deliverables by June 30, 2010:

- Approve 2008/2009 Annual Update Close-Out report.
- Conduct 2009/2010 project kick off.
- Finalize requirements and begin coding Annual Update enhancements.

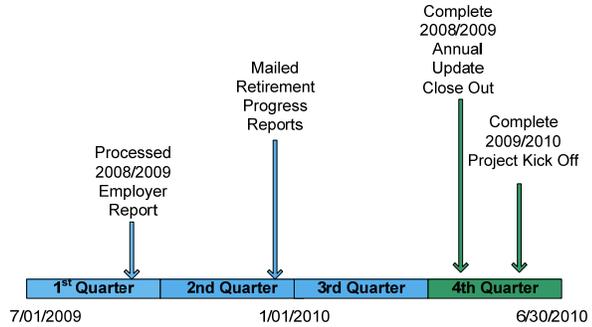
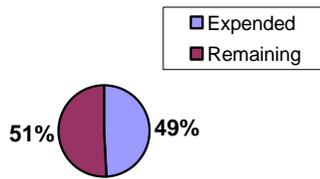
Strategic Fit

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

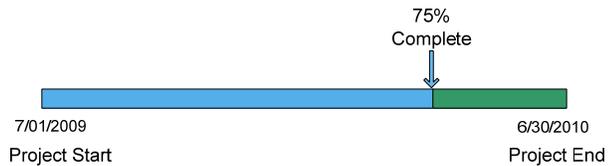
Warning: The Annual Update project is in warning status due to the high risk associated with the loss of a critical project resource.

Major Fiscal Year 2009/2010 Milestones

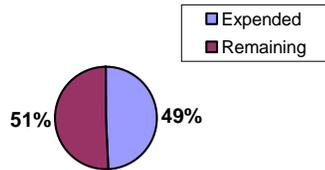
**2009/2010 Project Budget
\$121 Thousand**



Project Schedule Status Timeline



**Total Project Budget
\$121 Thousand**



Continuous Improvement Team 'Proof of Concept' Project

The Continuous Improvement Team 'Proof of Concept' Project – an effort to implement an enterprise business process improvement methodology and a continuous improvement program staffing plan.

Strategic Fit

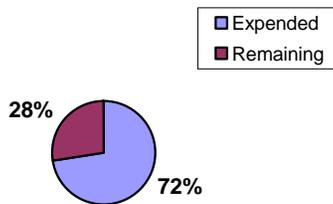
Goal: Internal Process (One & Done)

Objective: Increase Efficiency of Operations

Period Ending March 31, 2010:

- Completed Continuous Improvement Methodology training for the Project Management Office (PMO) and Support Accounting.
- Completed the Cost Benefit Analysis, GAP Analysis, Best Practice Research and Findings and Recommendations documents for the Internal Transfer Process Business Process Improvement effort.
- Partnered with accounting staff to draft an implementation plan for the Travel Administration Business Process Improvement (BPI) effort recommendations.
- Completed an Impact Assessment of the Department of General Services statewide travel management services contract on the CalSTRS travel administration BPI effort.
- Worked with business areas to integrate the BPI recommendations with CalSTRS Governance Councils and Strategic Planning processes.
- Finalized success criteria for the new Alternative Investment Solicitation process improvement.
- Initiated the CalSTRS Policy Process Review.
- Initiated the Benefit Factor Tables process review.

2009/2010 Project Budget \$812 Thousand

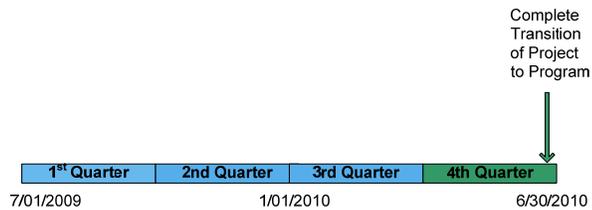
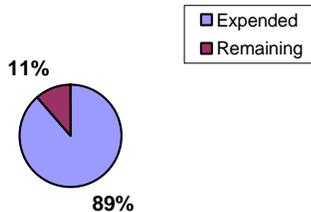


Planned Deliverables by June 30, 2010:

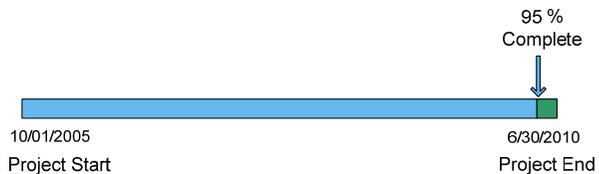
- Schedule and execute Future State Architecture As-Is Process Documentation workshops.
- Implement the new Travel Administration Business Process Improvement effort recommendations.
- Continue to work with business areas to integrate the Business Process Improvement recommendations with CalSTRS Governance Councils and Strategic Planning processes.
- Initiate new Business Process Improvement efforts as required.
- Complete the Single Point of Failure process documentation service for Survey Research and Analysis and Account Segregation.
- Finalize the Procure to Pay Business Process Improvement effort.
- Complete final transition of project to program.
- Complete the Benefit Factor Tables process review.

Major Fiscal Year 2009/2010 Milestones

Total Project Budget \$2 Million



Project Schedule Status Timeline



Cost Effectiveness Measurement

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

Period Ending March 31, 2010:

- Responded to questions received back from CEM Inc.
- Reviewed CEM, Inc draft report and responded with comments.
- Received final 2009 CEM Benchmarking Report.

Planned Deliverables by June 30, 2010:

- CEM Inc. presentation to CalSTRS Executives.
- Conduct Lessons Learned session.
- Initiate data collection process for 2010 Cost Effectiveness Measurement (CEM) Survey.

Strategic Fit

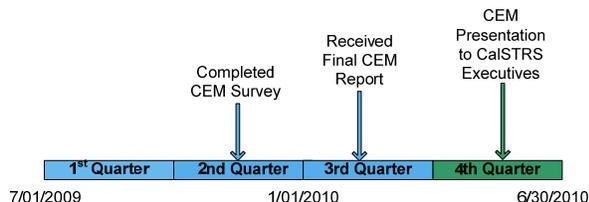
Goal: *Customer Service (No Surprises)*

Objective: **Improve Member and Employer Services**

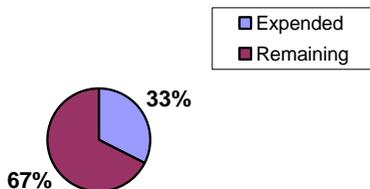
Goal: *Internal Process (One & Done)*

Objective: **Increase Efficiency of Operations**

Major Fiscal Year 2009/2010 Milestones



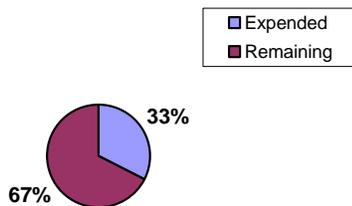
2009/2010 Project Budget \$51 Thousand



Project Schedule Status Timeline



Total Project Budget \$51 Thousand



Employer Reporting Project

The Employer Reporting Project will improve the employer reporting process and provide technologies in order to gain ongoing efficiencies and to increase the quality of member account data.

Strategic Fit

Goal: *Internal Process (One & Done)*

Objective: **Increase Efficiency of Operations**

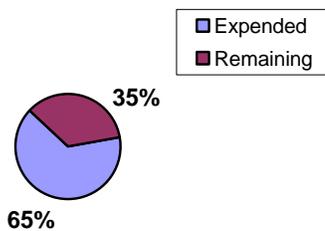
Period Ending March 31, 2010:

- Continued county enforcement for the Defined Benefit complex edits.
- Completed a minor Secure Employer Web site clean-up release.
- Developed and delivered final release training for staff and employers.
- Conducted the final Southern and Northern California in-person Employer Forum meetings.
- Conducted the final Employer Reporting Project (ERP) presentation to internal stakeholders and extended team members.
- Continued to transition activities and artifacts to the appropriate business and program areas within CalSTRS.
- Completed the transition of the developers to the information technology program area.
- Provided articles for the Employer Reporting STAR newsletter.

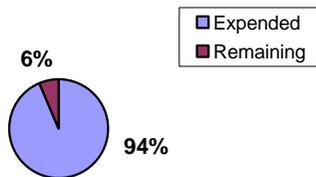
Planned Deliverables by June 30, 2010:

- Fully enforce DB complex edits for all but six counties.
- Complete a Secure Employer Web site release to enhance Manage Deposits.
- Conduct online Vendor Forum.
- Provide final project update for Audits and Risk Management (ARM) Board committee.
- Document the process to allow a report unit (district) to become a report source.
- Complete the transition activities.
- Complete the Transition Document.
- Complete the Close-Out Report.
- Complete the Systems Management Guide.

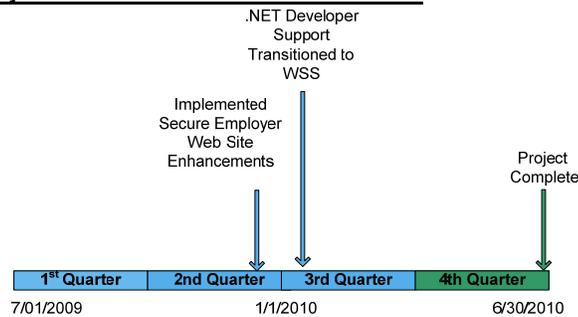
2009/2010 Project Budget
\$2.1 Million



Total Project Budget
\$11.3 Million



Major Fiscal Year 2009/2010 Milestones



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.

Period Ending March 31, 2010:

- Implemented initial Communications Plan activities.
- Finalized Foundational Work Effort Charters.
- Received project sponsors' approval of the Future State Architecture (FSA) Partnership Agreement and the Deliverable Expectation Documents.
- Completed Solutions Framework draft document.

Strategic Fit

Goal: *Internal Process (One& Done)*

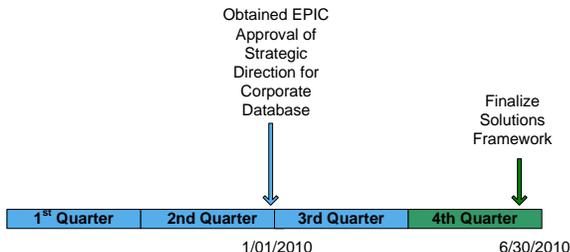
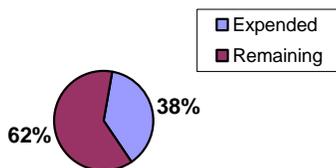
Objective: Increase Efficiency of Operations

Planned Deliverables by June 30, 2010:

- Complete Solutions Framework final document and request the Enterprise Program Investment Council (EPIC) approval.
- Initiate Foundational Work Efforts.

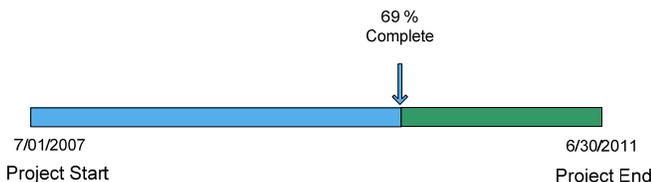
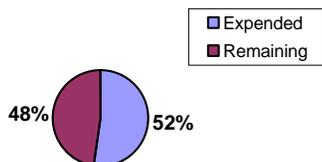
Major Fiscal Year 2009/2010 Milestones

2009/2010 Project Budget
\$1.2 Million



Project Schedule Status Timeline

Total Project Budget
\$1.9 Million



Headquarter Facility Project

The Headquarter Facility Project has completed a multiple year planning and construction effort to physically relocate its headquarters facility from a three building campus in Sacramento to a mid-rise office building in West Sacramento. The building move and related technology is complete. The new Hosted Contact Center system is now reporting under its own project.

Period Ending March 31, 2010:

- Resolved outstanding Audio Visual issues.
- Completed staff training on Audio Visual equipment.
- Completed integrating the Building Security System into the Converged Network.
- Transferred Hosted Contact Center activities, budget and schedule to a separate Hosted Contact Center project.

Planned Deliverables by June 30, 2010:

- Project is complete.

Strategic Fit

Goal: *Customer Service (No Surprises)*

Objective: **Improve Member and Employer Services**

Goal: *Internal Process (One & Done)*

Objective: **Increase Efficiency of Operations**

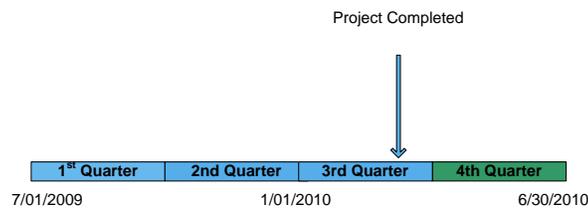
Goal: *Learning and Growth (Rock Solid)*

Objective: **Be an Employer of Choice**

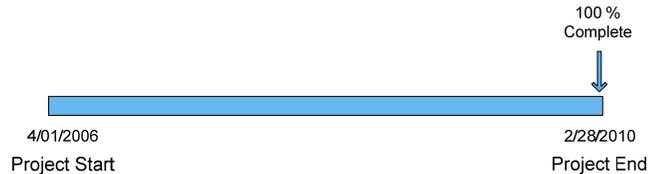
Total Project Cost: Project was completed within budget.

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

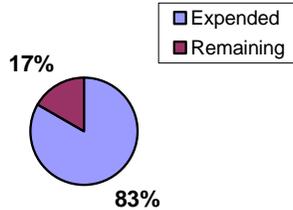
Major Fiscal Year 2009/2010 Milestones



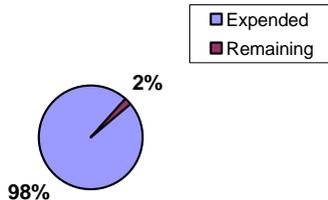
Project Schedule Status Timeline



2009/2010 Project Budget \$354 Thousand



Total Project Budget \$2.3 Million



Project Name	Purpose	Accomplishments
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Hosted Contact Center

The Hosted Contact Center project is the implementation of a new CalSTRS contact center at the new CalSTRS Headquarters facility. The Hosted Contact Center technical solution is provided by a 3rd party vendor partner and includes functionality for call routing, workforce planning and call recording of member telephone correspondence.

Period Ending March 31, 2010:

- Continued implementation of new Contact Center system for intake of member calls.
- Initiated a separate Hosted Contact Center project based on activities, budget and schedule transferred from Headquarters Facility project.

Planned Deliverables by June 30, 2010:

- Complete implementation of new Hosted Contact Center system for intake of member calls.
- Provide final acceptance of Hosted Contact Center and Converged Network Systems.

Warning: The Hosted Contact Center project is in warning status due to the system stability issues.

Strategic Fit

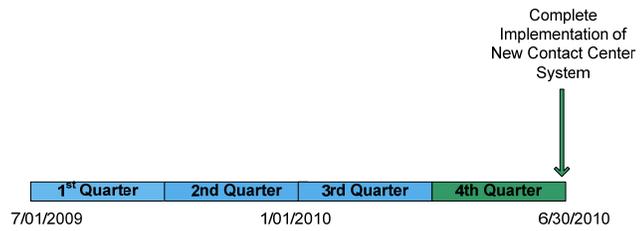
Goal: *Customer Service (No Surprises)*

Objective: **Improve Member and Employer Services**

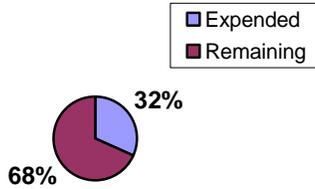
Goal: *Internal Process (One & Done)*

Objective: **Increase Efficiency of Operations**

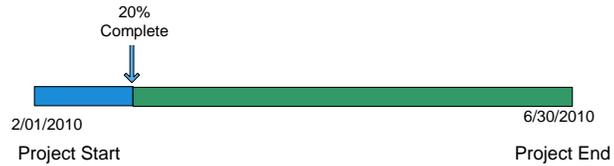
Major Fiscal Year 2009/2010 Milestones



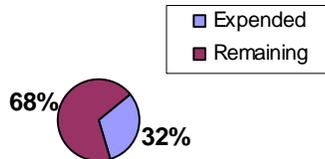
2009/2010 Project Budget
\$73 Thousand



Project Schedule Status Timeline



Total Project Budget
\$23 Thousand



Human Resource Management Information Systems

The Human Resources Management Information Systems Project will provide CalSTRS with the foundation for implementing Human Resources strategic vision, program development and technology based on industry leading best practices.

Period Ending March 31, 2010:

- Placed technology acquisition on hold.
- Completed Risk Replacement document.
- Received Succession Plan Recommendation for final review.
- Received Employee Performance Management Recommendation for final review.
- Received Training Administration Recommendation for review.

Planned Deliverables by June 30, 2010:

- Develop Board presentation on Risk Replacement.
- Develop plan to transition HRMIS deliverables to Human Resources.
- Request Enterprise Program Investment Council (EPIC) approval to reduce project scope and close out project by June 30, 2010.
- Provide final approval of the Employee Performance Management, Succession Planning and Training Administration recommendation documents.
- Complete final classification family competencies identification and validation.

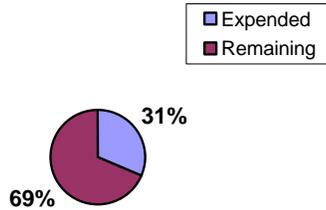
Strategic Fit

Goal: *Learning and Growth (Rock Solid)*

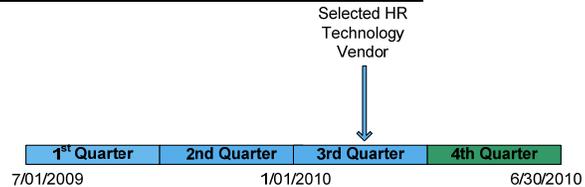
Objectives: Increase Competency-Based Performance

Warning: Schedule and Budget Warning: The Human Resources Management Information System project is in warning status due to cancellation of the Request for Proposal (RFP) and pending request to reduce project scope.

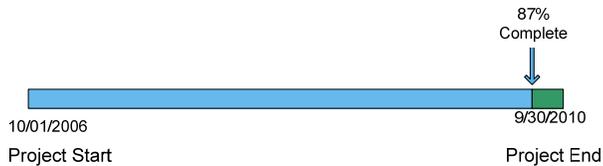
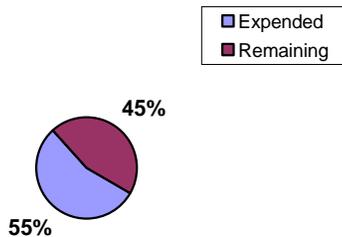
2009/2010 Project Budget
\$769 Thousand



Major Fiscal Year 2009/2010 Milestones



Total Project Budget
\$1.7 Million



Project Name	Purpose	Accomplishments
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Investment Accounting

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

Period Ending March 31, 2010:

- Received project approval and funding from the Enterprise Program Investment Council (EPIC).
- Finalized project work plan.
- Finalized master project management plan.

Strategic Fit

Goal: *Financial (Risk and Reward)*

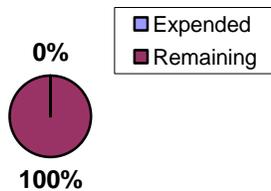
Objective: **Responsibly Manage Risk**

Planned Deliverables by June 30, 2010:

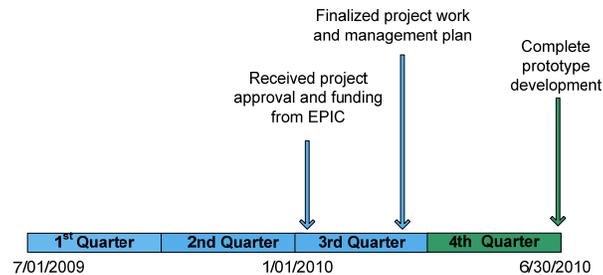
- Design and develop a prototype to transfer data from CalSTRS' third party custodians, in support of related analytics, reconciliations and key controls.
- Draft job descriptions and responsibilities for each identified resource within the Investment Accounting structure.
- Draft an updated organizational structure for Investment Accounting, including reporting lines, review protocols and documentation, and communication.
- Propose and finalize a Complex Securities Group and related charter that will analyze and evaluate the accounting implications of CalSTRS' investment types.

Note: The project was initiated in October 2008 with contingency funds and received Enterprise Program Investment Council (EPIC) funding beginning in January 2010.

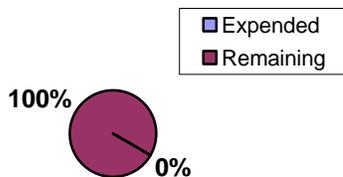
2009/2010 Project Budget
\$933 Thousand



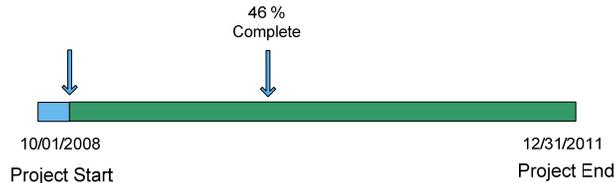
Major Fiscal Year 2009/2010 Milestones



Total Project Budget
3.2 Million



Project Schedule Status Timeline



Project Name	Purpose	Accomplishments
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myCalSTRS Online Services for Teachers

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.

Strategic Fit

Goal: *Learning and Growth (Rock Solid)*

Objectives: Increase Competency-Based Performance

Period Ending March 31, 2010:

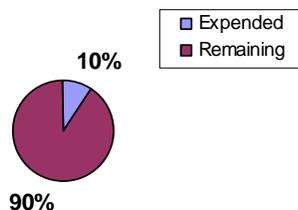
- Completed development of both the new user login process and direct deposit online registration.
- Completed requirements for the death beneficiary online form for both online submission and print, sign and mail.
- Completed requirements for the retirement application.
- Held two Project Status update meetings for CalSTRS staff.

Planned Deliverables by June 30, 2010:

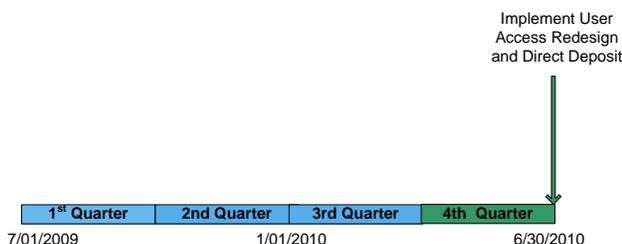
- Implement the new user login process and direct deposit online registration process.
- Complete the design phases for the death beneficiary online form as well as the six additional print, sign and mail forms (Releases 2 & 3).
- Request funding from Enterprise Program Investment Council (EPIC) for the project's temporary Call Center.

Note: The project was initiated in January 2009 with contingency funds and received Enterprise Program Investment Council (EPIC) funding beginning in December 2009.

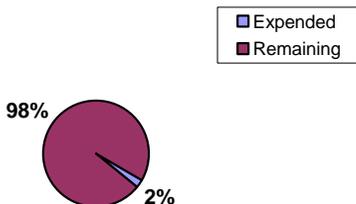
2009/2010 Project Budget
\$445 Thousand



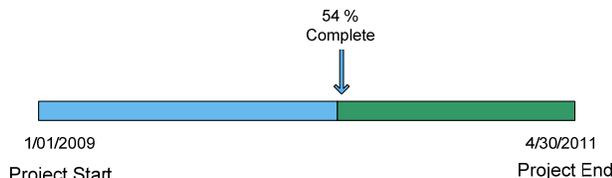
Major Fiscal Year 2009/2010 Milestones



Total Project Budget
\$1.7 Million



Project Schedule Status Timeline



Penalties and Interest

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

Period Ending March 31, 2010:

- Released a Request For Offer (RFO) to obtain project management services from a vendor with experience in similar software solutions.

Planned Deliverables by June 30, 2010:

- Develop, release and evaluate responses to a Request for Proposal for a commercial off-the-shelf (COTS) solution and integration vendor.
- Procure project management services.

Major Fiscal Year 2009/2010 Milestones

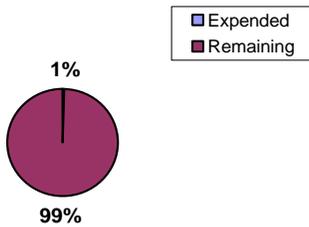
Strategic Fit

Goal: *Financial (Risk and Reward)*

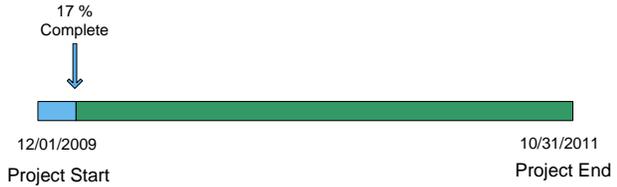
Objective: **Responsibly Manage Risk**



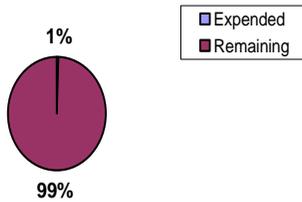
2009/2010 Project Budget
\$700 Thousand



Project Schedule Status Timeline



Total Project Budget
\$6 Million



Pension Accounting Initiative

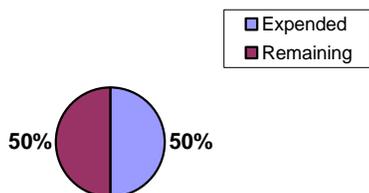
The Pension Accounting Initiative will improve internal controls by addressing gaps between current and best practices in accounting policy, planning, treatment, chart of accounts, analysis, availability of financial information, use of the general ledger, communication of fiscal impacts, and training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

Strategic Fit

Goal: *Financial (Risk and Reward)*

Objective: **Responsibly Manage Risk**

2009/2010 Project Budget
\$2 Million



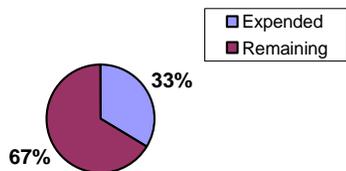
Period Ending March 31, 2010:

- Analyzed and revised the project scope and funding based on current complex business and resource needs.
- Obtained Enterprise Program Investment Council (EPIC) approval to increase the project budget and schedule for additional vendor services and to address the additional project complexity and lack of available staffing resources.
- Accounting policies and treatment
 - Developed high priority policies and established the review and approval process for policy formulation.
 - Developed the conceptual model of accounting treatment for the business events Business Event Accounting Treatment (BEAT). This model will be used to improve the accounting treatment for the 174 identified business events.
- Began examining financial reporting processes which will result in information provided in the Comprehensive Annual Financial Report (CAFR).

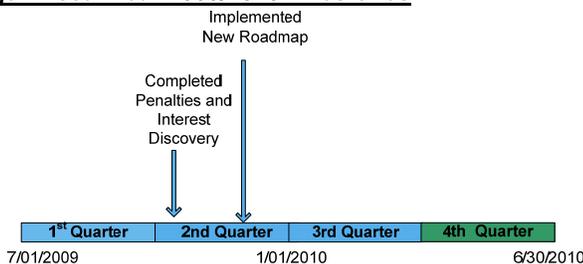
Planned Deliverables by June 30, 2010:

- Accounting Policies and Treatment
 - Continue to develop high priority policies.
 - Prioritize the newly established policies and develop a work plan for implementation, which includes communication, training, and procedural modification or establishment.
 - Continue to develop the Business Event Accounting Treatment (BEAT) tasks.
- Continue to examine and modify financial reporting processes which result in information provided in the Comprehensive Annual Financial Report (CAFR).
- Recruitment, Retention, and Training
 - Identify and provide targeted training for accounting personnel based on needs assessment.

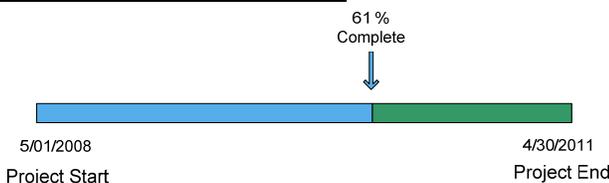
Total Project Budget
\$6.6 Million



Major Fiscal Year 2009/2010 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, 2010:

- Transitioned Corporate Scan Facility to Central Services Division.
- Continued Backfile Conversion of microfiche and microfilm.
- Continued development of P8 Enterprise Content Management System (ECMS).

Planned Deliverables by June 30, 2010:

- Complete Backfile Conversion of microfiche and microfilm.
- Implement new training courses in Records Management and Imaging System Functionality.
- Complete P8 Enterprise Content Management System Integration Testing.
- Request Enterprise Program Investment Council (EPIC) approval to extend the project end date to complete the P8 Enterprise Content Management System implementation.

Strategic Fit

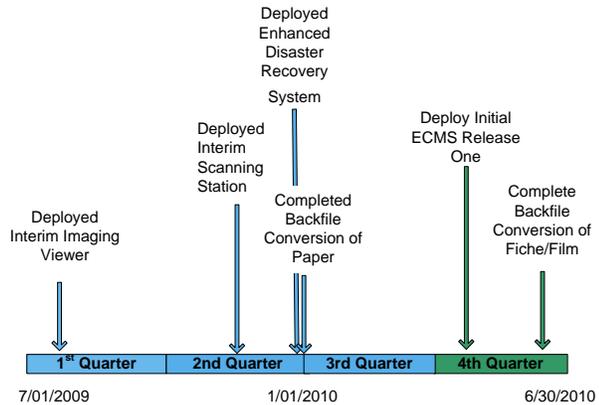
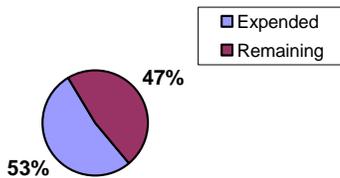
Goal: *Internal Process (One & Done)*

Objective: Increase Efficiency of Operations

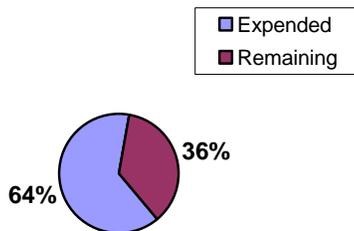
Schedule Warning: The Reduce Files project is in warning status due to increased time required to complete the P8 Enterprise Content Management System implementation.

Major Fiscal Year 2009/2010 Milestones

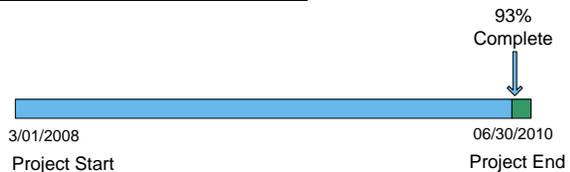
**2009/2010 Project Budget
\$4.2 Million**



**Total Project Budget
\$8.4 Million**



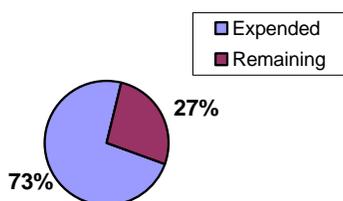
Project Schedule Status Timeline



Project Management Office Program

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

**2009/2010 Project Budget
\$1.2 Million**



Period Ending March 31, 2010:

- Continued to provide direction and project management resources for one project (Future State Architecture).
- Provided direction for one project (Investment Accounting) requesting EPIC funding and establishing an EPIC project schedule and budget.
- Provided direction for one project (Pension Accounting Initiative) requesting scope, schedule and budget modifications.
- Provided oversight and management (i.e. scope, schedule, budget, risk, issue) for fifteen enterprise projects/discovery efforts.
- Continued piloting Project Portfolio Management practices within the Project Management Office.
- Transitioned the Project Portfolio Management processes, tool discovery effort and pilot to the Future State Architecture project.
- Provided Project Express workshops to CalSTRS staff on project management processes and templates.

Planned Deliverables by June 30, 2010:

- Continue to provide direction and project management resources for one project (Future State Architecture).
- Provide direction for one project (Human Resource Management Information System) requesting scope, schedule and budget modifications.
- Provide direction for two projects (Actuarial Valuation and Reduce Files) requesting schedule and budget modifications.
- Provide direction for one effort (Historical Exceptions) requesting approval for a discovery.
- Provide direction for one project (Employer Reporting) conducting project closeout activities.
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.
- Complete one Post Implementation Evaluation Report (PIER) on the Community College - AB 1586 project.
- Initiate one Post Implementation Evaluation Report (PIER) on the Accounting Reengineering project.
- Update Project Express workshops and provide updated workshop series to CalSTRS staff on project management processes and templates.