

Jack Ehnes
Chief Executive Officer



California State Teachers'
Retirement System
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Sacramento, CA 95851-0275

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Board Members

Chair

Jerilyn Harris

Vice Chair

Harry Keiley

Kathleen Brugger
Dana Dillon
Roger Kozberg
Peter Reinke
Elizabeth Rogers
Carolyn Widener

September 22, 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:

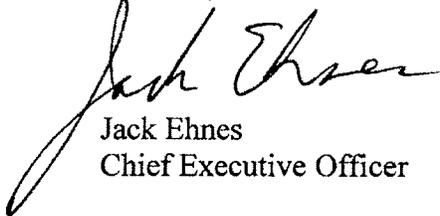
Pursuant to Section 2, Item 1920-001-0835, of the Annual Budget Act, enclosed is a copy of the Quarterly Enterprise Projects Report. As required, the report is being submitted to the Joint Legislative Budget Committee, the fiscal committees of the Legislature and the State Chief Information Officer.

The Quarterly Enterprise Projects Report summarizes the status of the California State Teachers' Retirement System (CalSTRS) enterprise projects, as of the fourth 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 \$14.3 million is allocated for the current fiscal year, and a total of \$10.2 million has been expended as of the fourth 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

Enclosure

CALSTRS

Enterprise Projects Fiscal Year 2009/2010 Fourth Quarter Report

Enterprise Projects

Fiscal Year 2009/2010 - Fourth 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

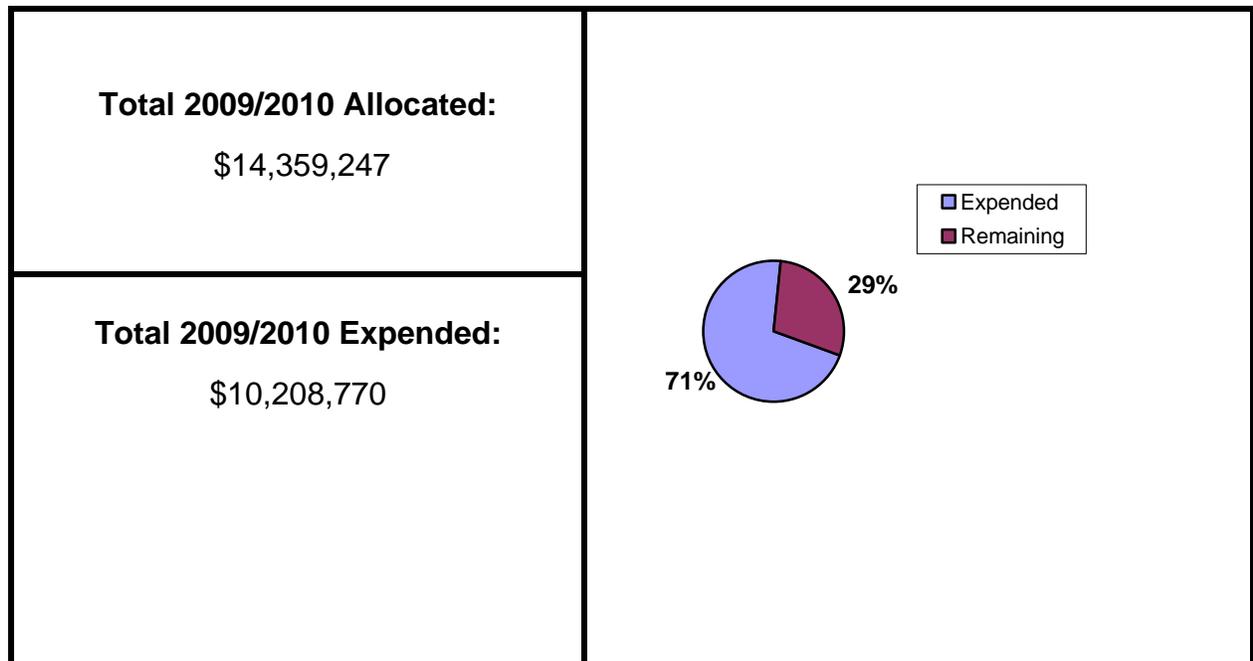
Janice Hanson
Deputy Chief Executive Officer
Enterprise Initiatives and Technology

Robin Madsen
Interim Chief Financial Officer

Brian Bartow
General Counsel

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

As of June 30, 2010



Enterprise Projects

Fiscal Year 2009/2010 - Fourth Quarter

Project Name	Duration	Project Total ¹	2009/2010 Budget	2009/2010 Expended ²	Schedule	Budget
Actuarial Valuation	Apr 08 – Jun 11	\$1,857,240	\$712,010	\$458,491	●	●
Additional Earnings and Annuity Credit	Feb 08 – Jan 10	\$1,232,017	\$141,402	\$132,580	☺	☺
Annual Update	Jun 09 – Jun 10	\$120,888	\$120,888	\$73,920	●	●
Continuous Improvement Team 'Proof of Concept'	Oct 05 – Jun 10	\$1,955,235	\$812,000	\$782,100	☺	☺
Cost Effectiveness Measurement	Jul 09 – Jun 10	\$50,880	\$50,880	\$16,992	●	●
Employer Reporting	Jul 05 – Jun 10	\$11,307,059	\$2,064,186	\$1,655,879	☺	☺
Future State Architecture	Jul 07 – Jun 11	\$2,265,732	\$941,340	\$637,462	●	●
Headquarter Facility	Apr 06 – Feb 10	\$2,318,564	\$353,659	\$295,156	☺	☺
Hosted Contact Center ³	Feb 10 – Jun 10	\$72,640	\$72,640	\$60,887	☺	☺
Human Resource Management Information System	Oct 06 – Jun 10	\$1,332,627	\$357,535	\$294,932	☺	☺
Investment Accounting ⁴	Oct 08 – Dec 11	\$3,180,000	\$1,133,000	\$0	●	●
MyCalSTRS Online Services for Teachers ⁵	Jan 09 – Jun 11	\$2,080,000	\$44,350	\$43,166	●	●
Penalties and Interest	Dec 09 – Oct 11	\$6,000,000	\$700,000	\$32,396	●	●
Pension Accounting Initiative	May 08 – Apr 11	\$6,561,768	\$1,955,031	\$1,471,583	●	●
Reduce Files	Mar 08 – Dec 10	\$7,483,524	\$3,237,320	\$2,955,465	●	●
Project Management Office Program	Ongoing	\$1,163,006	\$1,163,006	\$1,105,487	N/A	●
Project Risk Reserve	Ongoing	\$500,000	\$500,000	\$192,274	N/A	●

Total Enterprise Projects' 2009/2010 Budget: \$20 million	Total 2009/2010 Allocated: \$14,359,247	Total 2009/2010 Expended: \$10,208,770
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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 2009/2010 Expended – amount includes the project expenses paid and does not reflect expenses that have been accrued

³ Hosted Contact Center – system stability issues

⁴ Investment Accounting – project initiated with contingency funding and received EPIC funding in January 2010. The amount displayed above reflects EPIC funding only.

⁵ MyCalSTRS Online Services for Teachers – project initiated with contingency funding and received EPIC funding in November 2009. The amount displayed above reflects EPIC funding only.

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 June 30, 2010:

- Requested and received Enterprise Program Investment Council (EPIC) approval to extend project schedule due to furloughs, resource availability, and extensive testing activities.
- Completed testing and implementation activities for the Actuarial Data Mart, high-priority standard actuarial reports.
- Finalized, reviewed and approved Data Validation and Process Review Report produced by the Process Review Actuary vendor.

Board Strategic Fit

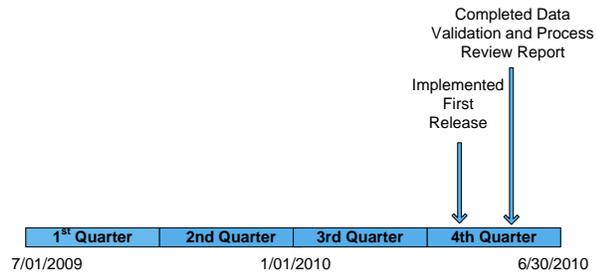
Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

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

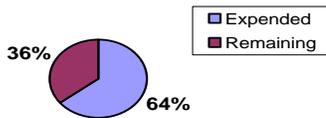
Planned Deliverables by September 30, 2010:

- Develop functionality for remaining standard statistical reports.
- Conduct risk review and reassessment to ensure risk management plan is current and contingencies and mitigations are appropriate.
- Continue Data Validation Screen design and development.

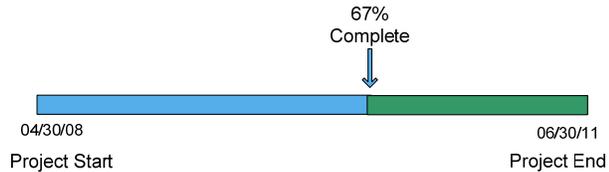
Major Fiscal Year 2009/2010 Milestones



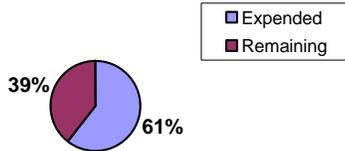
2009/2010 Project Budget
\$712 Thousand



Project Schedule Status Timeline



Total Project Budget
\$1.9 Million



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 June 30, 2010:

- Project is complete.

Planned Deliverables by September 30, 2010:

- Project is complete.

Board Strategic Fit

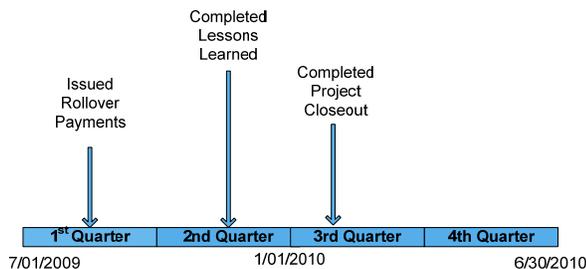
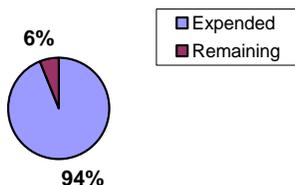
CalSTRS Board declaration for Additional Earnings & Annuity Credit at June 2007 Board Meeting

Total Project Cost: Project was completed within budget.

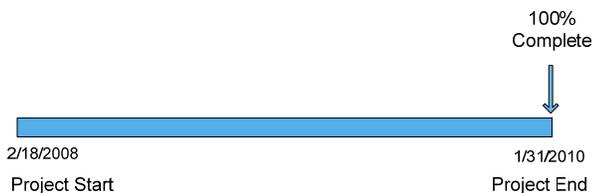
Schedule and Scope: Project was completed within the approved schedule and scope.

Major Fiscal Year 2009/2010 Milestones

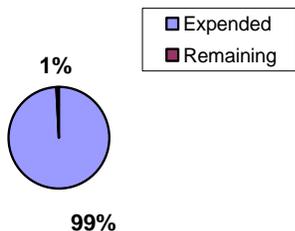
2009/2010 Project Budget
\$141 Thousand



Project Schedule Status Timeline



Total Project Budget
\$1.2 Million



Annual Update

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

Period Ending June 30, 2010:

- Approved 2008/2009 Annual Update Close-out report.
- Conducted 2009/2010 Project Kick Off.
- Created and mailed 54,000 address clean-up letters to members identified by a third party vendor as having a current mailing address.

Board Strategic Fit

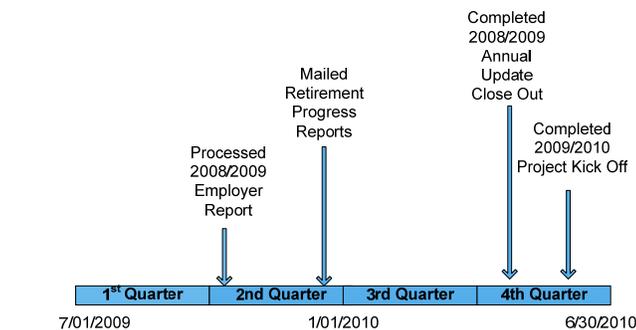
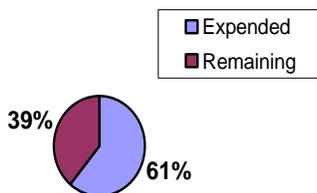
Teachers' Retirement Law requires individual account statements to be provided to each active and inactive member at least annually.

Planned Deliverables by September 30, 2010:

- Replace critical project resource.
- Prioritize 2009/2010 Annual Update system enhancements.
- Develop requirements and design specifications.
- Complete 2009/2010 Annual Update Address Clean-Up Project.

Major Fiscal Year 2009/2010 Milestones

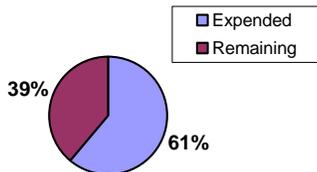
**2009/2010 Project Budget
\$121 Thousand**



Project Schedule Status Timeline



**Total Project Budget
\$121 Thousand**



Continuous Improvement Team 'Proof of Concept' Project

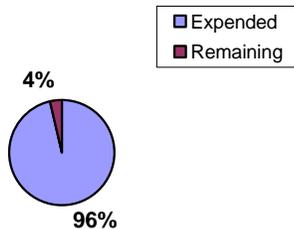
The Continuous Improvement Team 'Proof of Concept' Project – an effort to implement an enterprise business process improvement methodology and a continuous improvement program staffing plan.

Board Strategic Fit

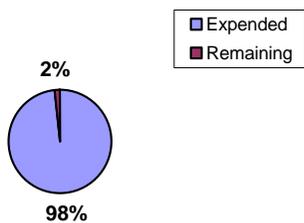
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

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

2009/2010 Project Budget
\$812 Thousand



Total Project Budget
\$2 Million



Period Ending June 30, 2010:

- Completed the Future State Architecture As-Is Process Documentation work effort kick-off session and workshops.
- Implemented the new Travel Administration Business Process Improvement effort recommendations related to the Department of General Services Travel Agency Agreement.
- Continued working with business areas to integrate the Business Process Improvement recommendations with CalSTRS Governance Councils and Strategic Planning processes.
- Completed the Single Point of Failure process documentation service for Survey Research and Analysis.
- Continued working on the Account Segregation Single Point of Failure process.
- Finalized the deliverables for the Procure to Pay Business Process Improvement effort.
- Coordinated the Policy Process Review effort with Legal Services.
- Completed the Benefit Factor Tables process review.
- Concluded transition from EPIC project status to program status.

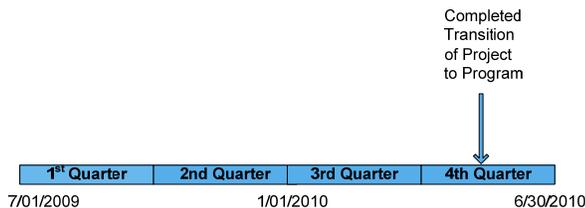
Planned Deliverables by September 30, 2010:

- Project is complete.

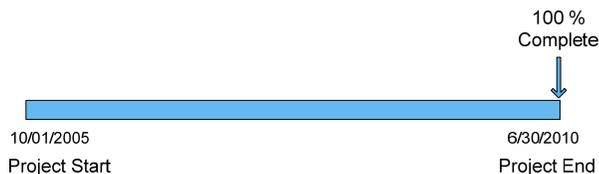
Total Project Cost: Project was completed within the approved budget. Funds were either returned during the fiscal year or unused funds were returned at the end of each fiscal year and the new total project budget was updated to reflect the actual expended amount.

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

Major Fiscal Year 2009/2010 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 appropriate benchmarks and best practices research.

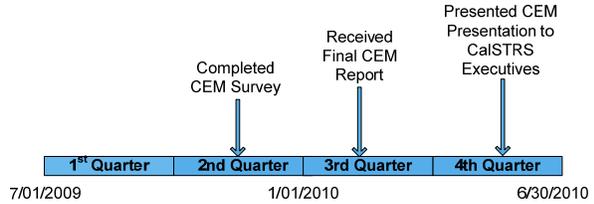
Period Ending June 30, 2010:

- Presented Cost Effectiveness Measurement (CEM) Benchmarking survey findings to CalSTRS Executives.
- Conducted Lessons Learned session.
- Completed Project Close-out Report.

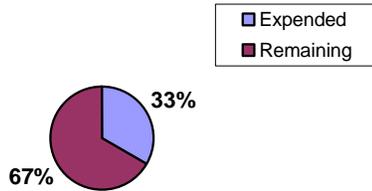
Planned Deliverables by September 30, 2010:

- Receive 2010 Survey from Cost Effectiveness Measurement (CEM) Inc.
- Conduct Kick-Off Meeting.
- Initiate data collection process for 2010 Cost Effectiveness Measurement (CEM) Survey.

Major Fiscal Year 2009/2010 Milestones



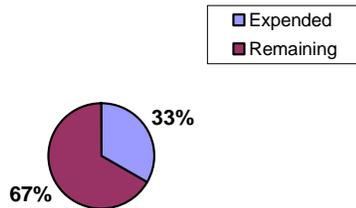
2009/2010 Project Budget \$51 Thousand



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.

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 June 30, 2010:

- Cancelled a Secure Employer Web site release to enhance Manage Deposits and removed functionality from project scope
- Conducted online Vendor Forum.
- Provided final project update for Audits and Risk Management (ARM) Board committee.
- Documented the process to allow a report unit (district) to become a report source and transitioned to the Member Account Services program area to conduct a pilot.
- Completed the project to program transition activities.
- Completed the Transition Document and presented to the information technology program groups.
- Completed the final draft Project Close-out Report.
- Completed the Developer's Handbook and presented to the Enterprise Initiatives & Technology (EIT) Program groups.

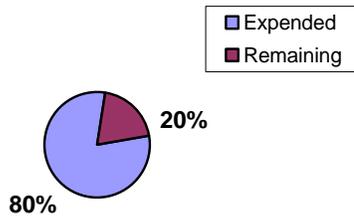
Planned Deliverables by September 30, 2010

- Project is complete.

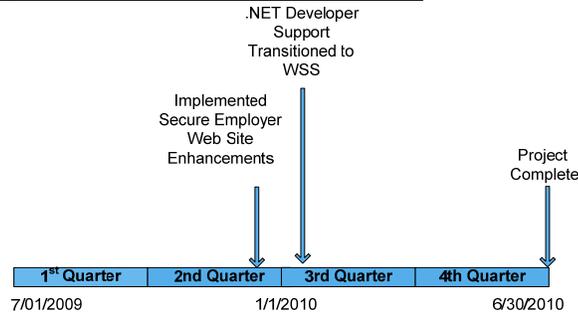
Total Project Cost: Project was completed within the approved budget. Funds were either returned during the fiscal year or unused funds were returned at the end of each fiscal year and the new total project budget was updated to reflect the actual expended amount.

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

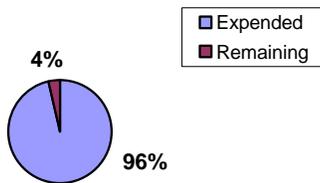
2009/2010 Project Budget
\$2.1 Million



Major Fiscal Year 2009/2010 Milestones



Total Project Budget
\$11.3 Million



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 G: *Identify and improve the efficiency of CalSTRS business.*

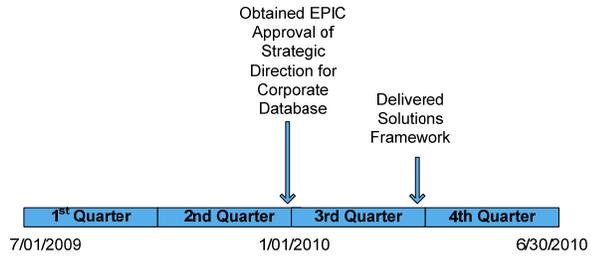
Period Ending June 30, 2010:

- Received Enterprise Program Investment Council (EPIC) approval of Solutions Framework.
- Provided briefings to Executive Staff on Project Portfolio Management (PPM) and Governance Enhancement efforts.
- Held Kick-off sessions for Approved Work Efforts (Governance Enhancements, As Is Processes, Cost Benefit Analysis, Market Research and Glossary).
- Began development of the Master Schedule for the Implementation Roadmap.

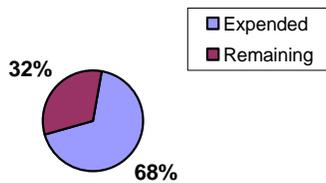
Planned Deliverables by September 30, 2010:

- Complete Implementation Roadmap.

Major Fiscal Year 2009/2010 Milestones



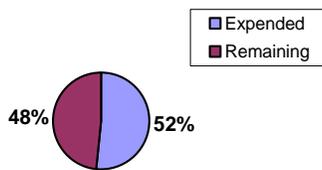
2009/2010 Project Budget
\$941 Thousand



Project Schedule Status Timeline



Total Project Budget
\$2.3 Million



Project Name	Purpose	Accomplishments
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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 June 30, 2010:

- Project is complete.

Planned Deliverables by September 30, 2010:

- Project is complete.

Total Project Cost: Project was completed within the approved budget. Funds were either returned during the fiscal year or unused funds were returned at the end of each fiscal year and the new total project budget was updated to reflect the actual expended amount.

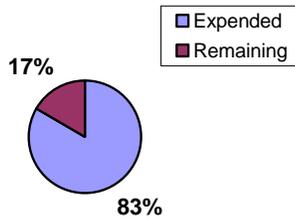
Schedule and Scope: Project was completed within the approved schedule and scope.

Board Strategic Fit

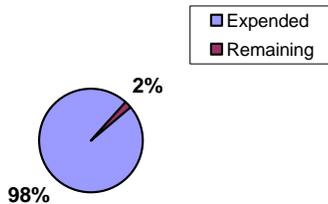
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

Objective C: **Complete the new headquarters building and business operations move.**

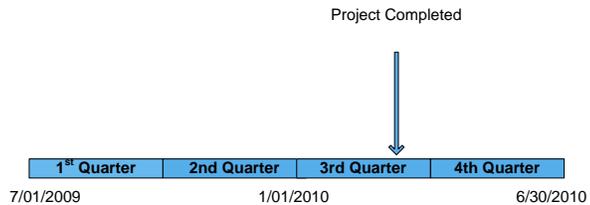
2009/2010 Project Budget
\$354 Thousand



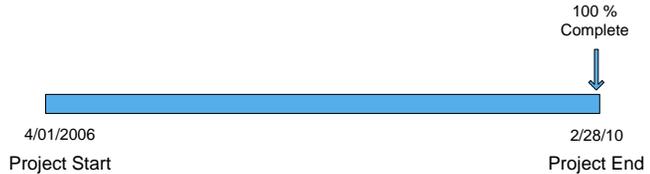
Total Project Budget
\$2.3 Million



Major Fiscal Year 2009/2010 Milestones



Project Schedule Status Timeline



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 June 30, 2010:

- Initiated a Hosted Contact Center project separate from the Headquarters project in March 2010.
- Completed implementation of new Hosted Contact Center system with limited scope and outstanding issues.
- Transitioned the Hosted Contact Center from project to program areas who will continue to resolve outstanding issues.

Planned Deliverables by September 30, 2010:

- Project is complete.

Total Project Cost: Project was completed within budget.

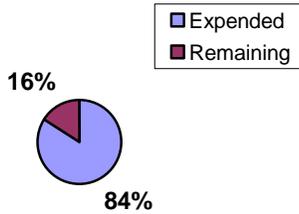
Schedule and Scope: Project was implemented with outstanding issues transitioned to the program areas to continue resolution efforts and with limited scope.

Scope Warning: The project is completed but transitioned to the program with limited functionality and a number of issues that the program areas will continue to work to resolve.

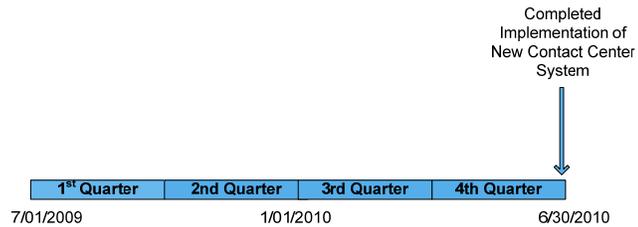
Board Strategic Fit

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

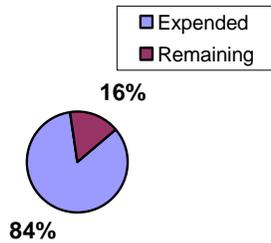
2009/2010 Project Budget
\$73 Thousand



Major Fiscal Year 2009/2010 Milestones



Total Project Budget
\$73 Thousand



Project Schedule Status Timeline



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.

Board Strategic Fit

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

Objective A: **Develop a workforce plan for the organization.**

Period Ending June 30, 2010:

- Obtained Enterprise Program Investment Council (EPIC) approval to eliminate the technology solution from the project scope and closed out the project by June 30, 2010.
- Obtained approval of the Employee Performance Management, Succession Planning and Training Administration recommendation documents.
- Completed classification family competencies identification and validation processes.
- Completed 'non-represented' Employee Performance Evaluation templates.
- Completed and/or transitioned all project deliverables.

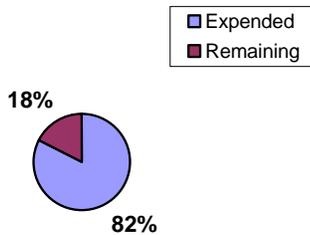
Planned Deliverables by September 30, 2010:

- Project is complete.

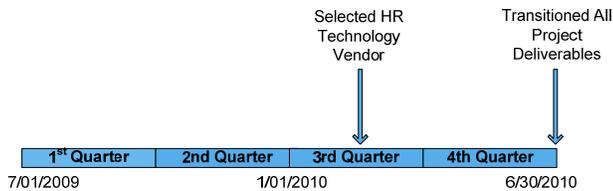
Total Project Cost: Project was completed within the approved budget. Funds were either returned during the fiscal year or unused funds were returned at the end of each fiscal year and the new total project budget was updated to reflect the actual expended amount.

Schedule and Scope: Project was completed within schedule with the approved revised scope that eliminated the technology solution from the project scope.

2009/2010 Project Budget
\$358 Thousand



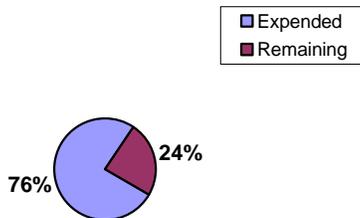
Major Fiscal Year 2009/2010 Milestones



Project Schedule Status Timeline



Total Project Budget
\$1.3 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 F: **Enhance the scope and quality of internal controls, internal audits and external audits.**

Period Ending June 30, 2010:

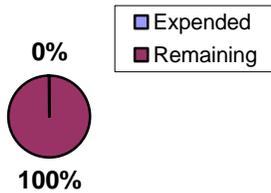
- Developed methodology to reduce manual reclassification entries for investments.
- Developed model for collaborative analysis, discussion and communication of desired investment accounting and reporting treatments for certain complex securities to the third party custodian.
- Hired Investment Accounting staff.
- Engaged in Fair Valuation activities for June 30, 2010 reporting.

Planned Deliverables by September 30, 2010:

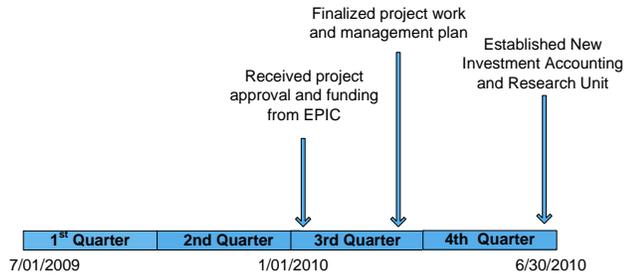
- Finalize comprehensive proposals and requirements for analysis, reconciliation and oversight tools for financial data maintained by third party custodians, including improved efficiencies in the transfer of data to CalSTRS for preparation of financial statements.
- Finalize a plan for a Complex Securities Group that will analyze and evaluate the accounting implications of CalSTRS' investment types and finalize the related charter.
- Begin implementation and operation activities.
- Complete Fair Valuation activities for 2009/10 fiscal year.

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. A total of \$570,545 of the 2009/2010 contingency funds have been expended.

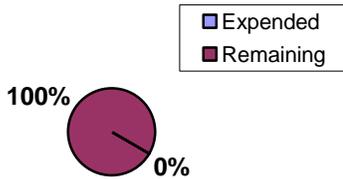
2009/2010 Project Budget
\$1.1 Million



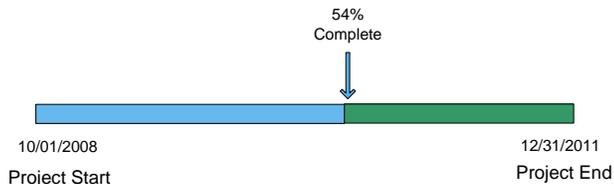
Major Fiscal Year 2009/2010 Milestones



Total Project Budget
3.2 Million



Project Schedule Status Timeline



myCalSTRS Online Services for Teachers (MOST)

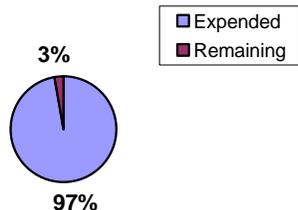
The MOST project will enhance member online services by updating the secure access and providing a variety of new online services including the ability to complete the retirement application and register for direct deposit online.

Board Strategic Fit

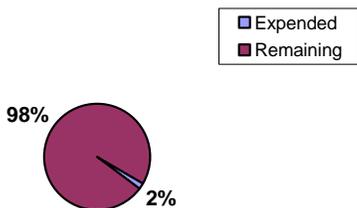
Goal 1: *Raise the quality in the delivery of benefits, products and services to best in class.*

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

2009/2010 Project Budget
\$44 Thousand



Total Project Budget
\$2.1 Million



Period Ending June 30, 2010:

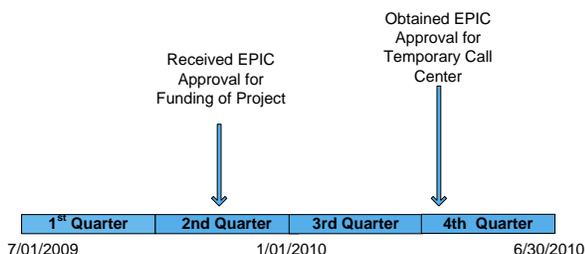
- Completed system, integration, and user acceptance testing (Release 1).
- Brought in both active and retired members to test the new user login and direct deposit processes
- Received funding from Enterprise Program Investment Council (EPIC) for the project's temporary Call Center.
- Hired and trained ten students for the project's temporary Call Center.
- Completed the design phase for the online Death Beneficiary form (Release 3).
- Released 300,000 email notices to members promoting myCalSTRS Online Services for Teachers (MOST).

Planned Deliverables by September 30, 2010:

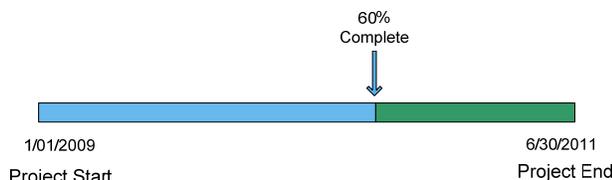
- Implement the new user login process and direct deposit online registration process (Release 1).
- Begin testing the print, sign and mail forms, as well as the on-line submit Pension Income Verification form (Release 2).
- Complete the design phase for the Refund application (Release 3).

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 \$543,000 in contingency funds has been expended.

Major Fiscal Year 2009/2010 Milestones



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.

Board Strategic Fit

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

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

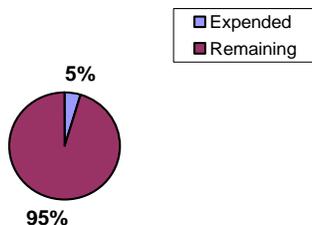
Period Ending June 30, 2010:

- Canceled a Request for Offer (RFO) to obtain project management services from a vendor with experience in similar software solutions due to lack of qualified responses.
- Developed, released and evaluated responses to a Request for Proposal (RFP) for a commercial off-the-shelf (COTS) solution and integration vendor.
- Conducted demonstrations and interviews with the bidding COTS solution and integration vendors and identified the apparent successful bidder.
- Requested and received Enterprise Program Investment Council (EPIC) approval to enter into vendor negotiations for a managed COTS solution and integration vendor.

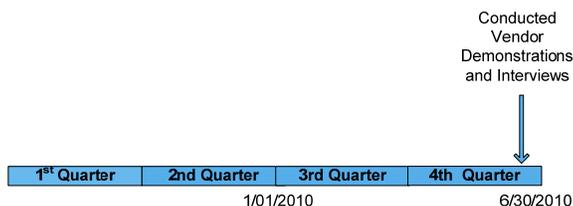
Planned Deliverables by September 30, 2010:

- Procure project management services.
- Finalize the vendor contract for commercial off-the-shelf solution and integration vendor.
- Request Enterprise Program Investment Council (EPIC) approval of the revised project budget and schedule.
- Initiate business requirements validation.

2009/2010 Project Budget
\$700 Thousand



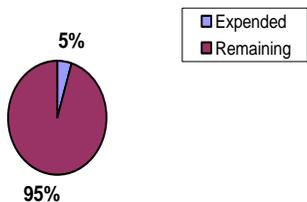
Major Fiscal Year 2009/2010 Milestones



Project Schedule Status Timeline



Total Project Budget
\$6 Million



Pension Accounting Initiative

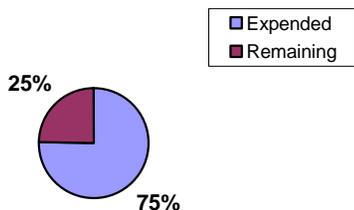
The Pension Accounting Initiative will improve internal controls by addressing gaps between current and best practices in accounting policy, planning, treatment, chart of accounts, analysis, availability of financial information, use of the general ledger, communication of fiscal impacts, and training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

Board Strategic Fit

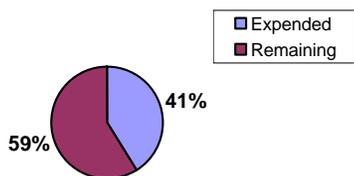
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

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

2009/2010 Project Budget
\$2 Million



Total Project Budget
\$6.6 Million



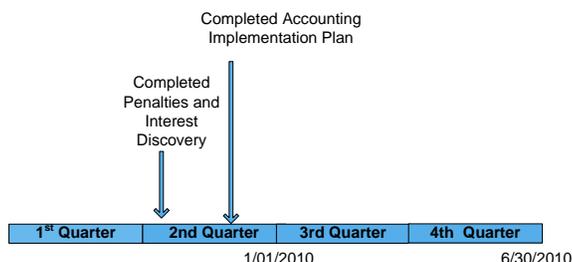
Period Ending June 30, 2010:

- Developed the accounting treatments and analytical reviews associated with the Business Event Accounting Treatment (BEAT) for the 26 of the 174 business events.
- Began development of enhanced internal controls over the technical and programmatic accounting areas.
- Developed and enacted 13 of the 17 identified high priority policies.
- Developed a work plan for implementation of high priority policies, including, communication, training and procedural changes.

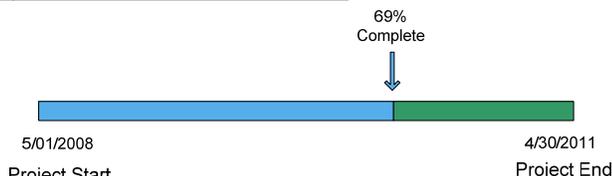
Planned Deliverables by September 30, 2010:

- Accounting Policies and Treatment
 - Continue to develop high priority policies.
 - Continue to develop the accounting treatments and analytical reviews associated with the Business Event Accounting Treatment (BEAT) subproject
- Complete design and implementation of enhanced internal controls over the technical and programmatic accounting areas.
- Continue developing the financial reporting framework future vision with the Financial Management and Reporting and Chart of Accounts teams.
- Develop the Chart of Accounts framework for CalSTRS' fiscal reporting requirements. Initiate the Discovery Effort for the Corporate Accounting and Resource Management System.

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 June 30, 2010:

- Completed Backfile Conversion of microfiche and microfilm.
- Continued development of P8 Enterprise Content Management System (ECMS).
- Continued development of new training courses in Records Management and Imaging System Functionality.
- Received approval from Enterprise Program Investment Council (EPIC) to extend the project end date to December 2010 allowing for thorough testing of the P8 Enterprise Content Management System prior to deployment.

Planned Deliverables by September 30, 2010:

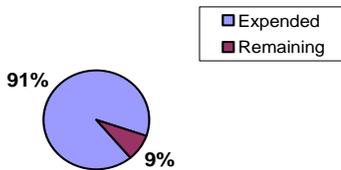
- Finalize and deploy new training course(s) in Records Management and Imaging System Functionality.
- Complete the project Transition Plan.

Board Strategic Fit

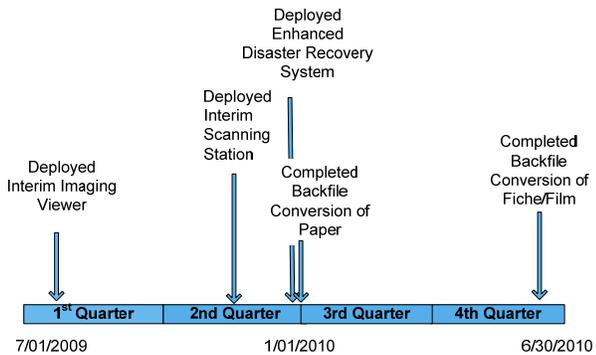
Goal 3: *Ensure a supportive and efficient organization and be an employer of choice.*

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

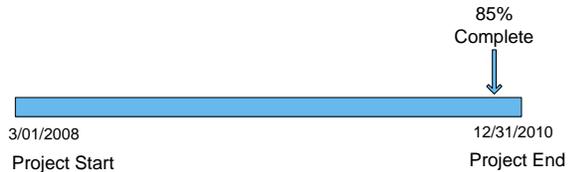
2009/2010 Project Budget
\$3.2 Million



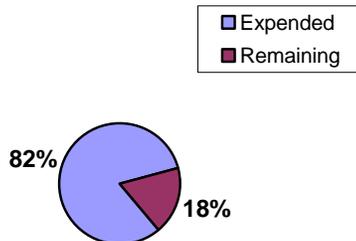
Major Fiscal Year 2009/2010 Milestones



Project Schedule Status Timeline



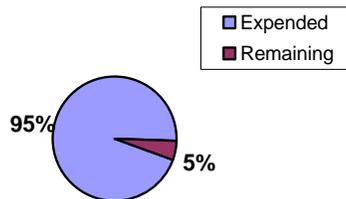
Total Project Budget
\$7.5 Million



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.

2009/2010 Project Budget
\$1.2 Million



Period Ending June 30, 2010:

- Continued to provide direction and project management resources for one project (Future State Architecture).
- Provided direction for two projects (Human Resource Management Information System and Reduce Files) requesting scope, schedule and budget modifications.
- Provided direction for two projects (Actuarial Valuation and Reduce Files) requesting schedule and budget modifications.
- Provided direction for one effort (Historical Exceptions) requesting approval for a discovery.
- Provided direction for one project (Penalties and Interest) requesting approval to enter into a vendor contract for a maximum contract amount pending a request to approve an updated project budget.
- Completed one Post Implementation Evaluation Report (PIER) on the Community College - AB 1586 project.
- Updated Project Express workshops and provide updated workshop series to CalSTRS staff on project management processes and templates.
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for thirteen enterprise projects/discovery efforts.

Planned Deliverables by September 30, 2010:

- Continue to provide direction and project management resources for one project (Future State Architecture).
- Provide direction for one project (Penalties and Interest) requesting schedule and budget modifications.
- Provide direction for one new project requests (Board Elections).
- Provide direction for one new discovery (Member Service Centers).
- Provide oversight and management (i.e. scope, schedule, budget, risk, issue) for ten enterprise projects/discovery efforts.
- Conduct Project Express workshop series to CalSTRS staff on project management processes and templates.