



California Public Employees' Retirement System  
my|CalPERS Post Implementation Evaluation Review (PIER) Plus  
Update

Briefing to the Finance and Administration Committee  
September 16, 2014  
Agenda Item 8c, Attachment 1



## Agenda

- Overview
- Approach
- Status
- Focus areas based on preliminary observations



## Overview

### my|CalPERS Post-Implementation Evaluation Report and Benefits Realization Assessment

- Purpose
  - Evaluate whether the project outcomes, end-user satisfaction, and business expectations of my|CalPERS have achieved their originally intended objectives and to assess the realization of benefits through the enterprise system solution
- Objectives
  - Assess whether the new system functions as expected and was delivered as documented
  - Compare the projected costs approved and the actual costs of implementing and maintaining
  - Compare the proposed cost savings to the actual cost savings
  - Evaluate the effectiveness of the process to re-scope and re-budget during the project lifecycle
  - Assess the effectiveness of project governance, project management and change management controls as compared to best practices
  - Identify lessons learned and successful practices
  - Examine the efficacy of the working business solution to see what further improvements can be made to optimize the benefits of the enterprise system

The results will help identify ways to improve and optimize the delivery and outcomes of future projects undertaken by CalPERS and provide guidance for the optimization of benefits



# Approach

## INITIATE

Plan activities, confirm requirements and determine any immediate needs

## DISCOVER

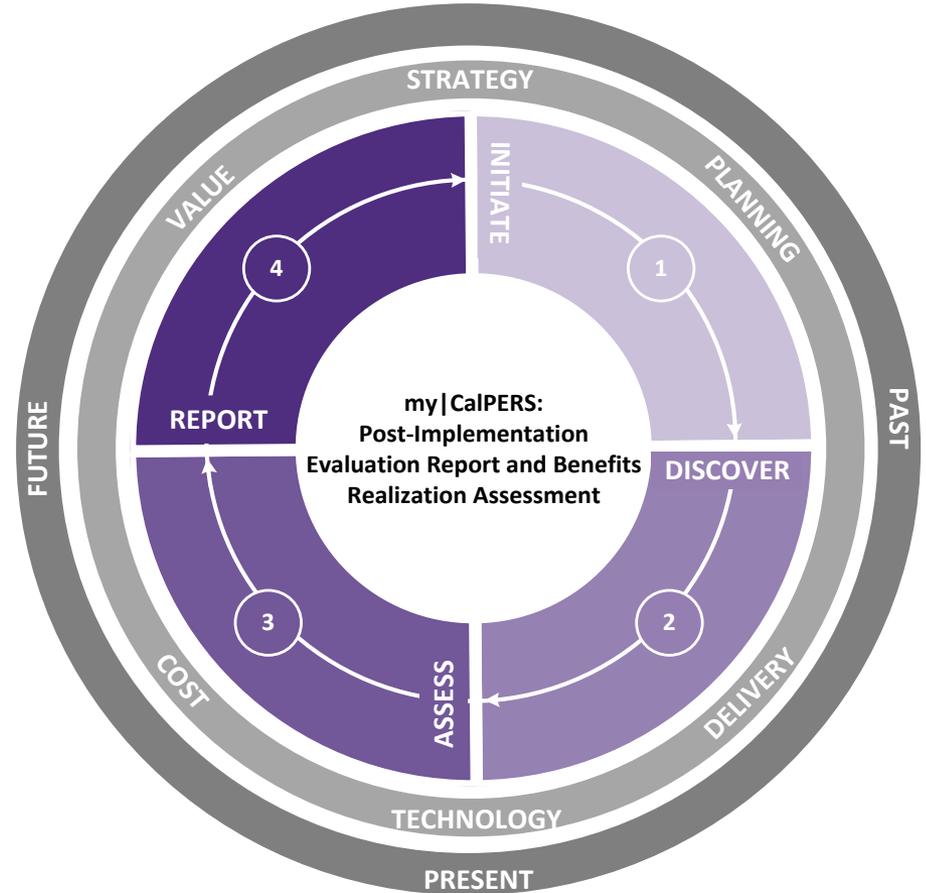
Collect data from stakeholders using the most appropriate methods

## ASSESS

Systematically review information to inform the assessment

## REPORT

Document and present the conclusion of the assessment



### Timeline

Today





# Approach (cont.)

- be objective
- emphasize openness
- anonymity

- what worked well
- what could be improved
- what were the unknowns

- be future-focused
- actionable recommendations
- implementable solutions



Can we take things further and deliver even bigger benefits?

## DELIVERABLES

**November 6, 2014**  
PIER Plus (Draft) Report

**December 11, 2014**  
PIER Plus (Final) Report

**November 17-19, 2014**  
Presentation to the Executives and Board of Administration (Finance and Administration Committee)

**Knowledge transfer conducted by mid-December 2014**

Knowledge Transfer for Implementation of Benefits Realization Roadmap

Knowledge Transfer for Project Management Practices



**Input to the Optimization Plan**



## Approach (cont.)

### ASSESSMENT CATEGORIES

**Strategic Management**

**Organizational Change Management**

**Benefits Realization Management**

**Solution Development and Implementation**

**Governance**

**Maintenance and Operations**

**Project Management**



## Status (as of mid-September 2014)

### Tasks completed:

- Conducted kick-off meeting
- Discussed and approved deliverable expectations
- Developed the assessment categories
- Conducted interviews with CalPERS executives
- Identified industry best practices and finalized the assessment checklist
- Identified stakeholders and determined the best method to engage them
- Developed materials to collect information from internal and external stakeholders

### Tasks that are in-process:

- Continue reviewing documentation
- Conducting meetings with CalPERS staff and external stakeholders
- Documenting findings
- Following-up on information provided that requires additional contact with stakeholders

### Future tasks:

- Identify lessons learned and successful practices
- Identify recommendations for improvement
- Develop deliverables and conduct knowledge transfer



# Focus Areas Based on Preliminary Observations

## Further analysis into these focus areas based on preliminary observations:

### Strategic Management

- Establishing the business case
- Genesis and chronology of vision and goals

### Benefits Realization Management

- Definition and measurement of benefits
- Achievement of benefits

### Governance

- Governance structure and process
- Effectiveness of governance and communications

### Project Management

- Procurement process
- Total cost
- Scope and schedule management

### Organizational Change Management

- Training and communications
- Knowledge transfer

### Solution Development and Implementation

- Enterprise technical architecture
- Data conversion

### Maintenance and Operations

- Partnership and knowledge transfer with the vendor