

## 2002 Early Out Project Plan

ID	Task Name	Start	Finish	% Complete	Resource Names
1	<b>Legislation</b>	<b>Mon 2/4/02</b>	<b>Wed 3/27/02</b>	<b>100%</b>	<b>William/Chris</b>
2	Share proposal with BLA	Mon 2/4/02	Mon 2/4/02	100%	Chris
3	Draft legislation	Mon 2/4/02	Thu 2/21/02	100%	Legislature,William,Chris
4	Introduce Bill	Fri 2/22/02	Fri 2/22/02	100%	Legislature
5	Provide legislation overviews	Fri 2/22/02	Fri 3/22/02	100%	William
6	Identify legislation issues for ORS	Fri 2/22/02	Thu 2/28/02	100%	BPLs
7	Review and approve bill in House	Fri 2/22/02	Thu 3/21/02	100%	House
8	Review and approve bill in Senate	Fri 3/1/02	Thu 3/21/02	100%	Senate
9	Sign bill into law	Fri 3/22/02	Wed 3/27/02	100%	Governor
10	<b>Business Plan</b>	<b>Mon 2/4/02</b>	<b>Mon 2/11/02</b>	<b>100%</b>	<b>BPLs</b>
11	Run query to estimate potential numbers	Mon 2/4/02	Tue 2/5/02	100%	Tim S.
12	Develop list of services to be provided	Mon 2/4/02	Tue 2/5/02	100%	BPLs
13	Identify resource needs	Tue 2/5/02	Fri 2/8/02	100%	BPLs
14	Develop business plan	Wed 2/6/02	Mon 2/11/02	100%	BPLs
15	Approve business plan	Mon 2/11/02	Mon 2/11/02	100%	Chris,Phil,Laurie
16	<b>Budget</b>	<b>Fri 2/8/02</b>	<b>Fri 11/29/02</b>	<b>100%</b>	<b>BPLs</b>
17	Estimate budget needs	Fri 2/8/02	Mon 2/11/02	100%	BPLs
18	Get approval for budget	Mon 2/11/02	Thu 3/21/02	100%	Chris
19	Develop budget spreadsheet	Fri 3/1/02	Wed 4/10/02	100%	Nonnie
20	Provide ongoing budget usage to Finance	Fri 3/22/02	Fri 11/29/02	100%	BPLs
21	Maintain budget spreadsheet	Fri 3/22/02	Fri 11/29/02	100%	Nonnie
22	Monitor Early Out budget usage	Fri 3/22/02	Fri 11/29/02	100%	BPLs,Nonnie

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23	<b>Regular Application Rescind</b>	<b>Mon 2/11/02</b>	<b>Wed 3/27/02</b>	<b>100%</b>	<b>Mary Ann</b>
24	Develop rescind policy	Mon 2/11/02	Fri 2/15/02	100%	Mary Ann,Sandy B.
25	Develop "option to rescind" letter	Mon 2/11/02	Fri 2/15/02	100%	Mary Ann,Sandy B.
26	Review pending regular apps to determine if terminate	Fri 2/15/02	Fri 2/15/02	100%	CP Staff
27	Send rescind letter to "not terminated" apps on file	Fri 2/15/02	Fri 2/15/02	100%	Jennifer A.
28	Send rescind letter to new regular apps received	Mon 2/18/02	Wed 3/27/02	100%	Jennifer A.
29	<b>Policies/Procedures</b>	<b>Mon 3/4/02</b>	<b>Fri 4/12/02</b>	<b>100%</b>	<b>Mary Ann</b>
30	Identify need for new or revised policies/procedures	Mon 3/4/02	Mon 4/1/02	100%	Miriam,Mary Ann
31	Develop policies/procedures	Mon 3/4/02	Fri 4/12/02	100%	Miriam,Mary Ann
32	Provide copies to all BPLs	Mon 3/4/02	Fri 4/12/02	100%	Miriam,Mary Ann
33	Distribute to affected staff	Mon 3/4/02	Fri 4/12/02	100%	BPLs
34	<b>Communication</b>	<b>Mon 2/4/02</b>	<b>Wed 11/27/02</b>	<b>100%</b>	<b>Kathy</b>
35	Develop Early Out website	Mon 2/4/02	Thu 2/7/02	100%	Robert
36	Develop web announcement	Wed 2/6/02	Thu 2/28/02	100%	Rosemary
37	Develop CNOC message	Wed 2/6/02	Thu 2/28/02	100%	Rosemary
38	Develop FAQs	Wed 2/6/02	Thu 3/21/02	100%	BPLs,Robert
39	Make continuous web updates	Mon 2/4/02	Tue 7/2/02	100%	Comm. Staff
40	Update internal staff on business/action plans	Thu 2/21/02	Wed 11/27/02	100%	BPLs

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41	<b>Retirement Packet</b>	<b>Wed 2/6/02</b>	<b>Mon 4/1/02</b>	<b>100%</b>	<b>Kathy</b>
42	Develop Early Out application & checklist	Wed 2/6/02	Fri 3/15/02	100%	Rosemary
43	Develop addendum to guidelines	Wed 2/6/02	Fri 3/15/02	100%	Connie
44	Develop seminars locations sheet	Wed 2/6/02	Fri 3/15/02	100%	Robert
45	Develop SL payout benef desig. Form	Wed 2/6/02	Fri 3/15/02	100%	Rosemary
46	Develop Early Out calculation sheets	Wed 2/6/02	Fri 3/15/02	100%	Connie,Rosemary
47	Develop query for service credit info	Wed 2/6/02	Thu 3/21/02	100%	Tim S.,Andy O.
48	Develop query for estimate info	Wed 2/6/02	Thu 3/21/02	100%	Tim S.,Andy O.
49	Develop letter to eligibles - 80s + 60s w/ 10 or 5	Wed 2/6/02	Thu 3/21/02	100%	Andy O.,Connie
50	Develop letter to eligibles - 75 w/purchase	Wed 2/6/02	Thu 3/21/02	100%	Andy O.,Connie
51	Develop letter to eligibles - DC transfers	Wed 2/6/02	Thu 3/21/02	100%	Andy O.,Connie
52	Develop letter to eligibles - Covered	Wed 2/6/02	Thu 3/21/02	100%	Andy O.,Connie
53	Print "regular" application forms	Fri 2/15/02	Thu 3/14/02	100%	Print & Graphics
54	Print Early Out application forms	Thu 3/21/02	Thu 3/21/02	100%	Print & Graphics
55	Collate packets	Fri 3/1/02	Fri 3/29/02	100%	Mail & Del. Serv.
56	Mail Packets	Fri 3/22/02	Mon 4/1/02	100%	Mail & Del. Serv.
57	<b>Benefit Estimator</b>	<b>Wed 2/6/02</b>	<b>Thu 3/21/02</b>	<b>100%</b>	<b>Kathy</b>
58	Revise calculations for new estimator	Wed 2/6/02	Thu 3/7/02	100%	Angie,ITSD
59	Perform testing	Fri 3/8/02	Mon 3/11/02	100%	Angie,ORS
60	Estimatorgoes on-line	Thu 3/21/02	Thu 3/21/02	100%	Angie,Robert,ITSD

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61	<b>Seminars</b>	<b>Wed 2/6/02</b>	<b>Tue 4/30/02</b>	<b>100%</b>	<b>Kathy</b>
62	Develop seminar schedule	Wed 2/6/02	Thu 2/28/02	100%	Fred
63	Book rooms	Wed 2/6/02	Thu 2/28/02	100%	Fred
64	Develop seminars	Tue 2/19/02	Thu 3/7/02	100%	Fred,Ray
65	Develop on-line scheduling application	Tue 2/19/02	Tue 3/19/02	100%	Kathy,ITSD,Angie
66	Conduct mock seminar for HR Directors	Thu 3/7/02	Thu 3/7/02	100%	Ray
67	Print seminar FAQs & forms	Thu 3/21/02	Fri 3/22/02	100%	Communications
68	Temp for scheduling	Thu 3/7/02	Tue 4/30/02	100%	Fred
69	On-line scheduling for seminars	Thu 3/21/02	Thu 4/25/02	100%	Fred,Temp
70	Conduct employee seminars	Mon 3/25/02	Thu 4/25/02	100%	Outreach
71	Conduct HR seminars	Fri 3/22/02	Thu 3/28/02	100%	Ray
72	<b>Human Resources</b>	<b>Fri 2/8/02</b>	<b>Fri 2/28/03</b>	<b>100%</b>	<b>Deb M.</b>
73	Determine temp staff needs and acquire	Fri 2/8/02	Fri 11/29/02	100%	BPLs,Ann S.
74	Provide orientation and obtain security lds	Mon 2/25/02	Fri 11/29/02	100%	Ann S.
75	Ongoing administration (tracking hrs., costs, contracts)	Mon 2/25/02	Fri 2/28/03	100%	Ann S.
76	<b>Logistics</b>	<b>Fri 2/8/02</b>	<b>Fri 11/29/02</b>	<b>100%</b>	<b>Deb M.</b>
77	Identify and prepare space for Early Out temps	Fri 2/8/02	Fri 3/15/02	100%	Meg L.,Linda M.
78	Identify need and order phones	Fri 2/8/02	Thu 3/21/02	100%	Lisa S.
79	Outfit temp offices w/chairs, supplies, etc.	Mon 2/25/02	Fri 3/15/02	100%	Amy B.
80	Obtain copiers for Early Out in Wing B	Fri 3/1/02	Mon 3/4/02	100%	Deb M.
81	Secure and make ready "App Proc'g' room"	Tue 3/5/02	Fri 3/15/02	100%	Meg L.,Linda M.
82	Coordinate security issues with Bldg. Mgr.	Mon 2/11/02	Fri 11/29/02	100%	Ann S.

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ID	Task Name	Start	Finish	% Complete	Resource Names
83	<b>Information Technology</b>	<b>Fri 2/8/02</b>	<b>Mon 4/1/02</b>	<b>100%</b>	<b>Deb M.</b>
84	Identify Early Out equipment needs and procure	Fri 2/8/02	Mon 4/1/02	100%	Deb M.,David
85	Determine PC configuration w/ITSD	Thu 2/14/02	Thu 2/14/02	100%	Deb M.,David
86	Coordinate printer acquisition w/Turnbull	Mon 2/11/02	Mon 4/1/02	100%	Deb M.
87	Test PC configuration w/ORS Apps	Fri 2/22/02	Tue 3/26/02	100%	David,Terry H.
88	Deploy Early Out "image" on PCs	Tue 3/5/02	Mon 3/11/02	100%	Dan Conlin
89	<b>Mail</b>	<b>Mon 2/11/02</b>	<b>Fri 11/15/02</b>	<b>100%</b>	<b>Deb M.</b>
90	Determine special Early Out mail handling needs	Tue 2/26/02	Mon 3/18/02	100%	Meg L.,Deb M.
91	Execute plan to accommodate	Wed 3/27/02	Fri 11/15/02	100%	Deb M.
92	Identify Conf Room D needs for April and secure	Mon 2/11/02	Fri 3/29/02	100%	Deb M.,Andy D.
93	Receive walk-in apps in Conf Room D	Mon 4/1/02	Tue 4/30/02	100%	Kim G.,Lisa N.
94	<b>Records</b>	<b>Tue 2/26/02</b>	<b>Fri 11/15/02</b>	<b>100%</b>	<b>Deb M.</b>
95	Determine special Early Out record needs	Tue 2/26/02	Mon 3/18/02	100%	Meg L.,Deb M.
96	Implement special procedures	Wed 3/27/02	Fri 11/15/02	100%	Joyce B.
97	<b>Microfilm</b>	<b>Fri 2/22/02</b>	<b>Fri 2/28/03</b>	<b>100%</b>	<b>Deb M.</b>
98	Determine special Early Out microfilm needs	Tue 2/26/02	Mon 3/18/02	100%	Meg L.,Deb M.
99	Implement special procedures	Wed 3/27/02	Fri 11/15/02	100%	Joyce B.
100	Perform SERS microfilm clean-up	Fri 2/22/02	Mon 4/15/02	100%	Microfilm Staff
101	Prepare 'back-end' handling of SERS apps	Tue 10/1/02	Fri 2/28/03	100%	Microfilm Staff,Temp

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ID	Task Name	Start	Finish	% Complete	Resource Names
102	<b>Contingency Plan for Retiring ORS Staff</b>	<b>Tue 2/19/02</b>	<b>Mon 5/20/02</b>	<b>100%</b>	<b>BPLs</b>
103	Identify the initial eligible staff list	Tue 2/19/02	Tue 2/19/02	100%	Chris
104	Discuss with eligible staff to determine intent	Tue 2/19/02	Thu 2/21/02	100%	BPLs
105	Conduct impact analysis	Fri 2/22/02	Fri 2/22/02	100%	BPLs
106	Identify extension recommendations	Fri 2/22/02	Fri 2/22/02	100%	BPLs
107	Develop and present contingency plan	Fri 2/22/02	Fri 2/22/02	100%	BPLs
108	Review contingency plan	Fri 2/22/02	Thu 2/28/02	100%	Chris,Phil,Laurie
109	Update and manage contingency plan as needed	Thu 2/28/02	Tue 4/30/02	100%	BPLs
110	Finalize plan after possible revokes are known	Wed 5/15/02	Mon 5/20/02	100%	BPLs
111	<b>Customer Request Responses</b>	<b>Wed 2/6/02</b>	<b>Thu 9/18/03</b>	<b>100%</b>	<b>Andy D.</b>
112	Create Early Out e-mail link	Mon 2/11/02	Mon 2/11/02	100%	Robert
113	Create ACD for Early Out	Mon 2/11/02	Mon 2/11/02	100%	Jon S.
114	Receive additional temp staff	Mon 3/4/02	Wed 3/13/02	100%	Andy D.,Joyce W.
115	Train additional temp staff	Mon 3/4/02	Mon 3/18/02	100%	Andy D.,Joyce W.
116	Respond to Early Out ACD phone calls	Wed 3/13/02	Fri 6/28/02	100%	Temp Staff
117	Respond to Early Out e-mail requests	Wed 2/6/02	Wed 11/27/02	100%	Customer Accts.
118	Respond to Early Out SC requests within 10 days	Wed 2/6/02	Thu 10/31/02	100%	Customer Accts.
119	Respond to billing requests within 10 days	Wed 2/6/02	Thu 10/31/02	100%	Customer Accts.
120	Create alternate walk-in area on 1st floor	Fri 3/1/02	Fri 3/29/02	100%	Andy D.
121	Identify staff to assist in alternate walk-in area & "D"	Fri 3/1/02	Fri 3/29/02	100%	Andy D.
122	Assist Early Out walk in customers (3rd fl, alt., D)	Wed 2/6/02	Thu 9/18/03	100%	Customer Accts.

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123	<b>HR Directors List of Applicants</b>	<b>Mon 4/1/02</b>	<b>Mon 5/20/02</b>	<b>100%</b>	<b>Kathy</b>
124	Develop query of applicants by Eff. Date & Dept.	Mon 4/1/02	Fri 5/3/02	100%	Tim S.
125	Send weekly lists to MIDB	Mon 4/8/02	Fri 5/3/02	100%	Tim S.
126	Produce final lists after 5-15 revoke date	Fri 5/17/02	Fri 5/17/02	100%	Tim S.
127	Send final lists to HR Directors	Mon 5/20/02	Mon 5/20/02	100%	Kathy
128	<b>Risk Management</b>	<b>Fri 3/1/02</b>	<b>Wed 11/27/02</b>	<b>100%</b>	<b>BPLs</b>
129	Identify risks	Fri 3/1/02	Wed 11/27/02	100%	BPLs
130	Develop response strategies	Fri 3/1/02	Wed 11/27/02	100%	BPLs
131	<b>SRVS Wage Collection (PI 935-a)</b>	<b>Mon 2/25/02</b>	<b>Fri 3/29/02</b>	<b>100%</b>	<b>Joanne</b>
132	Verify that identified screens meet needs	Mon 2/25/02	Tue 2/26/02	100%	Andy O.
133	Develop identified screens	Tue 2/26/02	Fri 3/8/02	100%	ITSD
134	Develop calculator to interface with SRVS 935-a	Fri 3/1/02	Mon 3/18/02	100%	Andy O.
135	Test	Mon 3/11/02	Thu 3/21/02	100%	Andy O.
136	Install new version of SRVS on computers	Mon 3/11/02	Fri 3/29/02	100%	ITSD
137	<b>CPPUP Update</b>	<b>Fri 3/1/02</b>	<b>Mon 4/1/02</b>	<b>100%</b>	<b>Andy O.</b>
138	Identify revisions needed for Early Out	Fri 3/1/02	Fri 3/29/02	100%	Andy O.
139	Update CPPUP	Fri 3/1/02	Mon 4/1/02	100%	Andy O./ITSD

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140	<b>Eligibility Determination/Pension Estimates</b>	<b>Tue 2/12/02</b>	<b>Fri 5/10/02</b>	<b>100%</b>	<b>Mary Ann</b>
141	Identify supervisors and submit paperwork	Tue 2/12/02	Fri 2/15/02	100%	Mary Ann
142	Define eligibility process steps	Wed 2/13/02	Fri 3/22/02	100%	Anthony,Lila,Tim D.
143	Request temporary staff	Thu 2/28/02	Thu 2/28/02	100%	Mary Ann
144	Train additional temp staff	Mon 3/18/02	Fri 3/29/02	100%	Lila,Tim D.
145	Determine eligibility and produce estimate	Mon 4/1/02	Fri 5/10/02	100%	Temp Staff
146	Review and answer disputes	Mon 4/15/02	Fri 5/10/02	100%	Lila,Tim D.
147	Review staff daily production	Mon 4/1/02	Fri 5/10/02	100%	Lila,Tim D.,Mary Ann
148	<b>Payroll Processing</b>	<b>Mon 5/13/02</b>	<b>Wed 11/27/02</b>	<b>100%</b>	<b>Mary Ann</b>
149	Review staffing needs	Mon 5/13/02	Mon 5/13/02	100%	Lila,Tim D.,Mary Ann
150	Request temporary staff	Mon 5/13/02	Mon 5/13/02	100%	Lila,Tim D.,Mary Ann
151	Define payroll process	Mon 5/13/02	Fri 5/24/02	100%	Lila,Tim D.
152	Define audit process	Mon 5/13/02	Fri 5/24/02	100%	Lila,Tim D.
153	Train temporary staff on payroll process	Tue 5/28/02	Fri 6/21/02	100%	Lila,Tim D.
154	Obtain final payroll information	Mon 6/24/02	Wed 11/27/02	100%	Temp Staff
155	Calculate final benefit	Mon 7/8/02	Wed 11/27/02	100%	Temp Staff
156	Audit benefit calculation	Mon 7/8/02	Wed 11/27/02	100%	Audit staff
157	Submit to payroll	Mon 7/8/02	Wed 11/27/02	100%	Audit staff
158	Re-enter application in new retirement system	Mon 7/8/02	Wed 11/27/02	100%	Temp Staff
159	Review and answer disputes	Mon 7/8/02	Wed 11/27/02	100%	Lila,Tim D.

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160	<b>Surveys</b>	<b>Wed 11/20/02</b>	<b>Fri 12/13/02</b>	<b>100%</b>	<b>Sandy B.</b>
161	Conduct surveys of Early Out customers	Wed 11/20/02	Fri 12/6/02	100%	Sandy B,Communications
162	Formalize survey results	Mon 12/9/02	Fri 12/13/02	100%	Sandy
163	<b>Final Report</b>	<b>Fri 3/1/02</b>	<b>Fri 12/20/02</b>	<b>94%</b>	<b>BPLs</b>
164	Document lessons learned	Fri 3/1/02	Wed 11/27/02	100%	BPLs
165	Develop report on Early Out process	Mon 12/2/02	Thu 12/19/02	20%	BPLs
166	Present report	Fri 12/20/02	Fri 12/20/02	0%	BPLs