

# Supporting California’s Transition to a Single, Statewide Financial Management System



## Case Study

### The Client

Financial Information System of California (FI\$Cal)

### The Project

FI\$Cal

## The Opportunity

In a bid to improve statewide oversight of California’s internal financial management operations, several state departments—including the Department of Finance, State Controller’s Office, State Treasurer’s Office, and the Department of General Services—partnered to support the development of the FI\$Cal system, one of the largest and most complex information technology (IT) projects in the Golden State’s history. The state sought an experienced partner to provide independent risk-based oversight of all design, development, configuration, interface, and implementation activities, and in 2012, Public Consulting Group (PCG) was selected to serve as an independent advisor on the project. Backed by extensive experience navigating the complexities of public sector IT engagements and more than 20 years of experience using the integrated technology platform FI\$Cal was built upon (Oracle PeopleSoft), PCG’s Technology Team was well positioned to partner with the state to provide ongoing oversight of FI\$Cal.

## The Solution

Since 2012, FI\$Cal has called on PCG to identify risks, issues, and obstacles across all aspects of the software development life cycle (SDLC), and to suggest mitigation strategies, many of which have been implemented by the state. Leveraging best practices from the Institute of Electrical and Electronics Engineers (IEEE), PCG’s Independent Verification and Validation (IV&V) activities have increased the project’s probability for success by forewarning the state of real or potential adverse situations, evaluating the project’s structure and all necessary project plans, resources, personnel, and other critical components. Key supports PCG has provided to FI\$Cal stakeholders include:



*Comprehensive reports assessing the project’s current performance with respect to the full SDLC including project management, configuration management, design, development and testing, organizational change management, operations and maintenance, and others*



*Best practices guidance in the areas of change and release management, customer service center processes and metrics, PeopleSoft upgrades during departmental implementations, and department month-end and year-end close processes*



*Assistance using the PeopleSoft Information Portal and Cumulative Feature Overview Tools*



*Risk-based guidance for working with My Oracle Support to review, escalate and resolve service requests*



*Identification of PeopleTools, PeopleSoft Update Manager (PUM) upgrades and additional components as needed to resolve break/fix issues*



*Review of change control board and enhancement review process*

## The Result

FI\$Cal has eliminated the need for hundreds of independent legacy systems and state-entity-specific applications that support California's internal financial management operations. As a result, California benefits from the increased standardization, transparency, discipline, effectiveness, and efficiency that FI\$Cal has brought to its crucial business processes. More than 160 state entities will conduct business through FI\$Cal when the system is fully rolled out: Onboarding has been completed for most of the agencies, boards, and departments in California, with a total of 152 entities now managed by FI\$Cal. (There are eight deferred and exempt departments.)

FI\$Cal's successful phased implementations to date have been due in part to PCG's independent, ongoing view of potential risks and obstacles. **Commenting on the service PCG provided to California in support of FI\$Cal, the Chief Deputy Director of the California Department of FI\$Cal said:**

“FI\$Cal wishes to acknowledge and thank Public Consulting Group (PCG) for 10 years of technical advisory services and independent verification and validation (IV&V) services. PCG's partnership with the Department has directly contributed to the success of the FI\$Cal project. FI\$Cal directly benefitted from PCG's timely and pragmatic approach to Advisory and IV&V services. Your deep PeopleSoft and IT knowledge, combined with your professionalism, your understanding of accounting and finance, the quality of your work product and your engaging style of IV&V project management has resulted in early course corrections.”

-Neeraj Chauhan,  
Chief Deputy Director, FI\$Cal

**To learn more about PCG's technology consulting services, including IV&V projects like FI\$Cal, contact us today.**

 (916) 798-8843  [services@pcgus.com](mailto:services@pcgus.com)

 [www.publicconsultinggroup.com](http://www.publicconsultinggroup.com)