

Exhibit 300 (BY2009)

PART ONE	
OVERVIEW	
1. Date of Submission:	2007-09-10
2. Agency:	015
3. Bureau:	45
4. Name of this Capital Asset:	Examination Desktop Support System (EDSS) - Release 2 - Major
5. Unique Project Identifier:	015-45-01-14-01-2466-00
6. What kind of investment will this be in FY2009?	
Full-Acquisition	
7. What was the first budget year this investment was submitted to OMB?	
FY2008	
8. Provide a brief summary and justification for this investment, including a brief description of how this closes in part or in whole an identified agency performance gap.	
<p>EDSS is a modernized system that will serve the IRS Small Business/Self Employed (SB/SE) division's tax return field examiners. It will support the current examination process, which was reengineered three years ago, and deliver new features and functionality. EDSS requires funding in FY09 to initiate hardware and software acquisitions. FY09 funds will be used to develop Release 2. SB/SE serves 45M taxpayers that pay \$915B in taxes annually. Its customers include fully or partially self-employed individuals and corporations and partnerships with assets up to \$10M. SB/SE taxpayers file a variety of tax returns including individual and business income tax returns, employment, excise, estate and gift, and trust returns. SB/SE is critically dependent on an outdated system called Reports Generation Software (RGS), developed nearly 25 years ago, that hinders the business' flexibility to implement frequent legislative changes. RGS processes are manually intensive and prone to error, hindering timely, high-quality services to taxpayers. EDSS' flexible, integrated, and centralized software architecture will: improve the business' ability to adapt to constantly changing business processes and tax codes; eliminate duplicate costs to acquire common capabilities through shareable software components; automate manually-intensive processes; digitize paper-dependent processes; improve exam quality; increase employee productivity and satisfaction; increase customer satisfaction; and reduce system maintenance costs. The impact of not fully funding the EDSS investment request would curtail full deployment of Release 2 EDSS/1040 and implementation of Release 3 1065, 1041, and 1120S and Release 4 1120. Tax return examiners would be forced to use two systems in order to perform exam functions thereby impacting productivity and SB/SE's ability to meet its field exam plan.</p>	
9. Did the Agency's Executive/Investment Committee approve this request?	
yes	
9.a. If "yes," what was the date of this approval?	
2007-08-16	
10. Did the Project Manager review this Exhibit?	
yes	
11. Project Manager Name:	
Gillen, Duane	
Project Manager Phone:	
202-283-0701	
Project Manager Email:	
Duane.Gillen@irs.gov	
11.a. What is the current FAC-P/PM certification level of the project/program manager?	
TBD	
12. Has the agency developed and/or promoted cost effective, energy-efficient and environmentally sustainable techniques or practices for this project.	

no
12.a. Will this investment include electronic assets (including computers)?
yes
12.b. Is this investment for new construction or major retrofit of a Federal building or facility? (answer applicable to non-IT assets only)
no
13. Does this investment directly support one of the PMA initiatives?
yes
If yes, select the initiatives that apply:
Expanded E-Government
Human Capital
13.a. Briefly and specifically describe for each selected how this asset directly supports the identified initiative(s)? (e.g. If E-Gov is selected, is it an approved shared service provider or the managing partner?)
Aid managers in making timely/efficient decisions based on the info reports generated by the system. Knowledge used to build this asset will assist in disseminating the skills of a retiring workforce. System will assist in recruiting/retention of new employees. Aid the public in reducing info requests during exams. Utilize internal systems to reduce info requests to reduce cost & provide a more efficient tool for exam. EDSS will reduce the expense/difficultly of doing business with the IRS.
14. Does this investment support a program assessed using the Program Assessment Rating Tool (PART)?
no
15. Is this investment for information technology?
yes
16. What is the level of the IT Project (per CIO Council's PM Guidance)?
Level 1
17. What project management qualifications does the Project Manager have? (per CIO Council's PM Guidance)
(1) Project manager has been validated as qualified for this investment
18. Is this investment identified as high risk on the Q4 - FY 2007 agency high risk report (per OMB memorandum M-05-23)?
yes
19. Is this a financial management system?
no
20. What is the percentage breakout for the total FY2008 funding request for the following? (This should total 100%)
Hardware 10
Software 5
Services 84
Other 1
21. If this project produces information dissemination products for the public, are these products published to the Internet in conformance with OMB Memorandum 05-04 and included in your agency inventory, schedules and priorities?
no
22. Contact information of individual responsible for privacy related questions.
Name
Carlos Moura
Phone Number
202- 927-0730
Title
Management and Program Analyst
Email

carlos.moura@irs.gov

23. Are the records produced by this investment appropriately scheduled with the National Archives and Records Administration's approval?

yes

24. Does this investment directly support one of the GAO High Risk Areas?

yes

SUMMARY OF SPEND

1. Provide the total estimated life-cycle cost for this investment by completing the following table. All amounts represent budget authority in millions, and are rounded to three decimal places. Federal personnel costs should be included only in the row designated Government FTE Cost, and should be excluded from the amounts shown for Planning, Full Acquisition, and Operation/Maintenance. The total estimated annual cost of the investment is the sum of costs for Planning, Full Acquisition, and Operation/Maintenance. For Federal buildings and facilities, life-cycle costs should include long term energy, environmental, decommissioning, and/or restoration costs. The costs associated with the entire life-cycle of the investment should be included in this report.

All amounts represent Budget Authority

	PY-1 & Earlier	PY	CY
	-2006	2007	2008
Planning Budgetary Resources	6.666	0.000	0.000
Acquisition Budgetary Resources	4.663	7.042	5.342
Maintenance Budgetary Resources	0.000	0.000	0.000
Government FTE Cost	4.413	1.581	2.787
# of FTEs	9	1	13

Note: For the cross-agency investments, this table should include all funding (both managing partner and partner agencies).

Government FTE Costs should not be included as part of the TOTAL represented.

2. Will this project require the agency to hire additional FTE's?

no

3. If the summary of spending has changed from the FY2008 President's budget request, briefly explain those changes.

FY2008 President's budget amount has increased from 4.950 to 5.465. This increase was allocated to contractor services under acquisition.

PERFORMANCE

In order to successfully address this area of the exhibit 300, performance goals must be provided for the agency and be linked to the annual performance plan. The investment must discuss the agency's mission and strategic goals, and performance measures (indicators) must be provided. These goals need to map to the gap in the agency's strategic goals and objectives this investment is designed to fill. They are the internal and external performance benefits this investment is expected to deliver to the agency (e.g., improve efficiency by 60 percent, increase citizen participation by 300 percent a year to achieve an overall citizen participation rate of 75 percent by FY 2xxx, etc.). The goals must be clearly measurable investment outcomes, and if applicable, investment outputs. They do not include the completion date of the module, milestones, or investment, or general goals, such as, significant, better, improved that do not have a quantitative measure.

Agencies must use the following table to report performance goals and measures for the major investment and use the Federal Enterprise Architecture (FEA) Performance Reference Model (PRM). Map all Measurement Indicators to the corresponding Measurement Area and Measurement Grouping identified in the PRM. There should be at least one Measurement Indicator for each of the four different Measurement Areas (for each fiscal year). The PRM is available at www.egov.gov. The table can be extended to include performance measures for years beyond FY 2009.

Fiscal Year	Strategic Goal Supported	Measurement Area	Measurement Grouping	Measurement Indicator	Baseline	Planned Improvement to the Baseline	Actual Results
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1	2009	Promote Stable U.S. and World Economies	Mission and Business Results	Taxation Management	architecture agility / flexibility score	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	
2	2009	Ensure Professionalism, Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury	Customer Results	Customer Satisfaction	# and/or % of customers satisfied	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	
3	2009	Manage the U.S. Government's Finances Effectively	Processes and Activities	Cycle Time	# and/or % reduction in examination cycle time	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	
4	2009	Manage the U.S. Government's Finances Effectively	Technology	Overall Costs	# of redundant tax computation IT capital projects avoided	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	The system will not be operational until FY10; therefore, there are no improvements for this measurement category	
5	2010	Promote Stable U.S. and World Economies	Mission and Business Results	Taxation Management	architecture agility / flexibility score	The architecture agility / flexibility will be assessed, scored, and baselined in FY09	Increase architecture flexibility / agility score by 33%	
6	2010	Ensure Professionalism, Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury	Customer Results	Customer Satisfaction	# and/or % of customers satisfied	65% (2005 Performance Measures under RGS system)	Customer satisfaction within the SB/SE Field Office Exam survey will increase by .5%	
7	2010	Manage the U.S. Government's Finances	Processes and Activities	Cycle Time	# and/or % reduction in examination cycle time	220 days (average) (2005 Performance	Reduce by 5 days	

		Effectively				Measures under RGS system)		
8	2010	Manage the U.S. Government's Finances Effectively	Processes and Activities	Efficiency	# and/or % reduction in case closing processing time	13 days (average) (2005 Performance Measures under RGS system)	Reduce by 5 days	
9	2010	Manage the U.S. Government's Finances Effectively	Processes and Activities	Costs	# and/or % of cases sent electronically to Programs & Special Planning (PSP) groups	New Measurement	20%	
10	2010	Ensure Professionalism, Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury	Technology	Functionality	# and/or % of employees satisfied	Percentage of users satisfied will be baselined in FY09	Increase user satisfaction related to the system within the SB/SE Field Exam Office by 2%	
11	2010	Manage the U.S. Government's Finances Effectively	Technology	Overall Costs	# of redundant tax computation IT capital projects avoided	New Measurement	Avoid 3 systems duplicating development of a tax computation component	
12	2010	Manage the U.S. Government's Finances Effectively	Technology	Operations and Maintenance Costs	% reduction in system O&M costs	The current legacy system O&M costs will be baselined in FY10	Reduce by 5% (check with AD)	
13	2010	Manage the U.S. Government's Finances Effectively	Technology	Data Storage	# and/or % of closed cases stored electronically	New Measurement	5% for FY09 (check with RGS Maintenance)	
14	2010	Manage the U.S. Government's Finances Effectively	Technology	Functionality	# of tax return types electronically supported	4 (2005 Performance Measures under RGS system)	Increase by 1	
15	2011	Promote Stable U.S. and World Economies	Mission and Business Results	Taxation Management	architecture agility / flexibility score	The architecture agility / flexibility will be assessed, scored, and baselined in FY09	Increase architecture flexibility / agility score by 33%	
16	2011	Ensure Professionalism,	Customer Results	Customer Satisfaction	# and/or % of customers	65% (2005 Performance	Customer satisfaction	

		Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury			satisfied	Measures under RGS system)	within the SB/SE Field Office Exam survey will increase by 1%	
17	2011	Manage the U.S. Government's Finances Effectively	Processes and Activities	Costs	# and/or % of cases sent electronically to Programs & Special Planning (PSP) groups	New Measurement in FY2010	20%	
18	2011	Ensure Professionalism, Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury	Technology	Functionality	# and/or % of employees satisfied	Percentage of users satisfied will be baselined in FY09	Increase user satisfaction related to the system within the SB/SE Field Exam Office by 2%	
19	2011	Manage the U.S. Government's Finances Effectively	Technology	Operations and Maintenance Costs	% reduction in system O&M costs	The current legacy system O&M costs will be baselined in FY10	Reduce by 10% (Check with AD)	
20	2011	Manage the U.S. Government's Finances Effectively	Technology	Data Storage	# and/or % of closed cases stored electronically	New Measurement in FY2010	5% for FY09 (check with RGS Maintenance)	
21	2012	Promote Stable U.S. and World Economies	Mission and Business Results	Taxation Management	architecture agility / flexibility score	The architecture agility / flexibility will be assessed, scored, and baselined in FY09	Increase architecture flexibility / agility score by 33%	
22	2012	Ensure Professionalism, Excellence, Integrity, and Accountability in the Management and Conduct of the Depart. of Treasury	Customer Results	Customer Satisfaction	# and/or % of customers satisfied	65% (2005 Performance Measures under RGS system)	Customer satisfaction within the SB/SE Field Office Exam survey will increase by 1.5%	
23	2012	Manage the U.S. Government's Finances Effectively	Technology	Operations and Maintenance Costs	% reduction in system O&M costs	The current legacy system O&M costs will be baselined in FY10	Reduce by 15% (Check with AD)	

24	2012	Manage the U.S. Government's Finances Effectively	Processes and Activities	Cycle Time	# and/or % reduction in examination cycle time	220 days (average) (2005 Performance Measures under RGS system)	Reduce by 10 days	
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EA

In order to successfully address this area of the business case and capital asset plan you must ensure the investment is included in the agency's EA and Capital Planning and Investment Control (CPIC) process, and is mapped to and supports the FEA. You must also ensure the business case demonstrates the relationship between the investment and the business, performance, data, services, application, and technology layers of the agency's EA.

1. Is this investment included in your agency's target enterprise architecture?

yes

2. Is this investment included in the agency's EA Transition Strategy?

yes

2.a. If yes, provide the investment name as identified in the Transition Strategy provided in the agency's most recent annual EA Assessment.

This investment is identified as Examination Desktop Support System (EDSS) in the current release of Treasury EA Transition Strategy.

3. Is this investment identified in a completed (contains a target architecture) and approved segment architecture?

yes

3.a. If yes, provide the name of the segment architecture as provided in the agency's most recent annual EA Assessment.

Enterprise Transition Plan, Volume 1: Enterprise Transition Strategy (IRS)

4. Identify the service components funded by this major IT investment (e.g., knowledge management, content management, customer relationship management, etc.). Provide this information in the format of the following table. For detailed guidance regarding components, please refer to <http://www.whitehouse.gov/omb/egov/>.

Component: Use existing SRM Components or identify as NEW. A NEW component is one not already identified as a service component in the FEA SRM.

Reused Name and UPI: A reused component is one being funded by another investment, but being used by this investment. Rather than answer yes or no, identify the reused service component funded by the other investment and identify the other investment using the Unique Project Identifier (UPI) code from the OMB Ex 300 or Ex 53 submission.

Internal or External Reuse?: Internal reuse is within an agency. For example, one agency within a department is reusing a service component provided by another agency within the same department. External reuse is one agency within a department reusing a service component provided by another agency in another department. A good example of this is an E-Gov initiative service being reused by multiple organizations across the federal government.

Funding Percentage: Please provide the percentage of the BY requested funding amount used for each service component listed in the table. If external, provide the funding level transferred to another agency to pay for the service.

	Agency Component Name	Agency Component Description	Service Type	Component	Reused Component Name	Reused UPI	Internal or External Reuse?	Funding %
1	Case Management	Manages the lifecycle of cases for taxpayer examinations. Maintains all information about the case including support documentation.	Tracking and Workflow	Case Management			No Reuse	26
2	Mathematical	Calculation rules engine which performs basic mathematical calculations. Rules in the database perform complete tax return calculations.	Analysis and Statistics	Mathematical			No Reuse	47

3	Tax Account Management Business Logic	Manages the lifecycle of cases/issues or data for taxpayer examinations/collections/appeals/litigation/criminal investigation	Data Management	Data Exchange			No Reuse	26
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5. To demonstrate how this major IT investment aligns with the FEA Technical Reference Model (TRM), please list the Service Areas, Categories, Standards, and Service Specifications supporting this IT investment.

FEA SRM Component: Service Components identified in the previous question should be entered in this column. Please enter multiple rows for FEA SRM Components supported by multiple TRM Service Specifications.

Service Specification: In the Service Specification field, Agencies should provide information on the specified technical standard or vendor product mapped to the FEA TRM Service Standard, including model or version numbers, as appropriate.

	SRM Component	Service Area	Service Category	Service Standard	Service Specification (i.e., vendor and product name)
1	Case Management	Service Access and Delivery	Access Channels	Other Electronic Channels	MS C#
2	Case Management	Service Access and Delivery	Delivery Channels	Intranet	IRS LAN
3	Case Management	Service Access and Delivery	Service Requirements	Legislative / Compliance	Sect 508 Security Controls
4	Case Management	Service Access and Delivery	Service Transport	Service Transport	HTTPS/SSL
5	Case Management	Service Platform and Infrastructure	Support Platforms	Platform Dependent	MS Windows XP
6	Case Management	Service Platform and Infrastructure	Delivery Servers	Application Servers	Win64
7	Case Management	Service Platform and Infrastructure	Software Engineering	Integrated Development Environment	Visual Studio .NET
8	Case Management	Service Platform and Infrastructure	Software Engineering	Software Configuration Management	Rational Suite
9	Case Management	Service Platform and Infrastructure	Software Engineering	Software Configuration Management	Rational Suite
10	Case Management	Service Platform and Infrastructure	Software Engineering	Software Configuration Management	Rational Suite
11	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Deployment Management
12	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Requirements Management
13	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Functional Testing
14	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Usability Testing
15	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Performance Profiling
16	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Load/Stress/Volume Testing
1	Case	Service Platform and	Software	Test Management	Security Access Control

7	Management	Infrastructure	Engineering		
18	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Reality Testing
19	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Configuration Testing
20	Case Management	Service Platform and Infrastructure	Software Engineering	Test Management	Installation Testing
21	Case Management	Service Platform and Infrastructure	Database / Storage	Database	SQL Server
22	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Servers / Computers	Enterprise Server
23	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	RAM
24	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	Hard Disk Drive
25	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	Microprocessor
26	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Peripherals	Printer
27	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Local Area Network (LAN)	Ethernet
28	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Wide Area Network (WAN)	Ethernet
29	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Network Devices / Standards	Hub
30	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Network Devices / Standards	Switch
31	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Network Devices / Standards	Router
32	Case Management	Service Platform and Infrastructure	Hardware / Infrastructure	Network Devices / Standards	Firewall
33	Case Management	Component Framework	Security	Certificates / Digital Signatures	HTTPS/SSL
34	Case Management	Component Framework	Presentation / Interface	Dynamic Server-Side Display	C#
35	Case Management	Service Platform and Infrastructure	Support Platforms	Platform Independent	C#
36	Data Exchange	Component Framework	Data Interchange	Data Exchange	XML
37	Case Management	Service Interface and Integration	Interoperability	Data Format / Classification	XML
38	Case Management	Service Interface and Integration	Interoperability	Data Types / Validation	XML Schema
39	Case Management	Service Interface and Integration	Interface	Service Description / Interface	API/Protocol
40	Mathematical	Service Access and Delivery	Service Transport	Service Transport	HTTPS/SSL
41	Mathematical	Service Platform and Infrastructure	Support Platforms	Platform Dependent	MS Windows XP

4 2	Mathematical	Service Platform and Infrastructure	Delivery Servers	Application Servers	Win64
4 3	Mathematical	Service Platform and Infrastructure	Software Engineering	Integrated Development Environment	Visual Studio .NET
4 4	Mathematical	Service Platform and Infrastructure	Database / Storage	Database	SQL Server
4 5	Mathematical	Service Platform and Infrastructure	Hardware / Infrastructure	Servers / Computers	Enterprise Server
4 6	Mathematical	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	RAM
4 7	Mathematical	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	Hard Disk Drive
4 8	Mathematical	Service Platform and Infrastructure	Hardware / Infrastructure	Embedded Technology Devices	Microprocessor
4 9	Mathematical	Component Framework	Presentation / Interface	Dynamic Server-Side Display	C#
5 0	Mathematical	Service Platform and Infrastructure	Support Platforms	Platform Independent	C#
5 1	Data Exchange	Component Framework	Data Interchange	Data Exchange	XML
5 2	Mathematical	Service Interface and Integration	Interoperability	Data Format / Classification	XML
5 3	Case Management	Service Interface and Integration	Interoperability	Data Types / Validation	XML Schema
5 4	Case Management	Service Interface and Integration	Interface	Service Description / Interface	API/Protocol
5 5	Case Management	Service Access and Delivery	Access Channels	Other Electronic Channels	MS C#
5 6	Case Management	Service Access and Delivery	Delivery Channels	Intranet	IRS LAN
5 7	Case Management	Service Access and Delivery	Service Requirements	Legislative / Compliance	Sect 508 Security Controls
5 8	Case Management	Service Access and Delivery	Service Transport	Service Transport	HTTPS/SSL
5 9	Case Management	Service Platform and Infrastructure	Support Platforms	Platform Dependent	MS Windows XP
6 0	Case Management	Service Platform and Infrastructure	Delivery Servers	Application Servers	Win64

6. Will the application leverage existing components and/or applications across the Government (i.e., FirstGov, Pay.Gov, etc)?

no

PART TWO

RISK

You should perform a risk assessment during the early planning and initial concept phase of the investment's life-cycle, develop a risk-adjusted life-cycle cost estimate and a plan to eliminate, mitigate or manage risk, and be actively managing risk throughout the investment's life-cycle.

Answer the following questions to describe how you are managing investment risks.

1. Does the investment have a Risk Management Plan?

yes
<i>1.a. If yes, what is the date of the plan?</i>
2007-05-24
<i>1.b. Has the Risk Management Plan been significantly changed since last year's submission to OMB?</i>
yes
<i>1.c. If yes, describe any significant changes:</i>
Revised management plan now includes a chart to further define the procedures for identifying risks and contingencies along with the details of mitigating these items.
<i>3. Briefly describe how investment risks are reflected in the life cycle cost estimate and investment schedule:</i>
Schedule - The EDSS project team incorporates identified risks into the project schedule. This is accomplished by identifying risks, developing a mitigation strategy, and identifying the event trigger and likely date of occurrence. The risk inventory is then updated with this assessment data, which acts as an input into developing/updating the project schedule such as activity estimates and Work Breakdown Structure (WBS) with the expected date that the risk will occur. Life-cycle Costs - Per guidance from the Federal Chief Information Officer (CIO) council's Value Measuring Methodology (VMM), the EDSS project team risk-adjusted costs by defining a qualitative and quantitative risk scale for impact and probability, assessing the qualitative and quantitative impact and probability for each risk, calculating risk-adjustment factors by multiplying each risk's impact and probability, and applying those factors to selected cost elements to adjust the expected value to account for risk.
COST & SCHEDULE
<i>1. Does the earned value management system meet the criteria in ANSI/EIA Standard 748?</i>
yes
<i>2. Is the CV% or SV% greater than $\hat{A} \pm 10\%$?</i>
yes
<i>2.a. If yes, was it the?</i>
Both
<i>2.b. If yes, explain the variance.</i>
The current cost variance is due to the complexity of the application which required the contractor to resource it team with more experienced designers/programmers which required a higher hourly rate than originally planned. As well, cost estimates for infrastructure and testing as originally included have increased due to more accurate cost estimates being received from PRIME/CSC for modernized testing environment. The current schedule variance is due to (1) a change in service contractor (first contractor failed to perfect calculator prototype), (2) longer than expected time needed for business rules development and validation which impacted the schedule, and (3) late base lining of the tax calculator requirements which impacted the final tax calculator design.
<i>2.c. If yes, what corrective actions are being taken?</i>
The current variances in the EDSS E300 business case is due to the EDSS Project Team performing to a baselined project schedule that is different than the EDSS E300 project schedule submitted by SB/SE. The difference is due to the required submission date for the E300 was earlier than the finalization and baselining of the current EDSS Project Schedule. The planning date (E300 submission) for the EDSS Pilot was projected for October 2007, however, based on Milestone 4 planning, the new EDSS Pilot date moved to July of 2008. The July 2008 date for the EDSS Pilot is a baselined date agreed to by the SB/SE Director of Examination and the contractor. The baselined Milestone 4 schedule was presented and agreed to at the September 28, 2006 SB/SE Governance Board. EDSS has prepared a detailed programmatic baseline change request (BCR) that provides dates and costs that are in alignment with the current EDSS baselined WBS, which has already been approved by the SB/SE Director of Examination and the Reporting Compliance ESC. A BCR was submitted in July 2007 and approved by Treasury in December 2007. The EDSS E300 business case project schedule is now in agreement with the EDSS project team baselined project schedule. EDSS will continue to have cost and schedule variances due to 'historic milestones' for 2007 that will never be performed against.
<i>3. Has the investment re-baselined during the past fiscal year?</i>
yes