EDR^2 Update PowerPoint
Franchise Tax Board Meeting
Thursday, March 4, 2021

Slide 1: EDR^2 Update
Enterprise. Data. Revenue!

Presenter(s) Name(s): Jose Orozco – EDR^2 Technical Director and Jennifer Roussel – EDR^2 Business Director
March 4, 2021

Slide 2: Tax Systems Modernization
30-Year Vision

An illustration shows three circles aligned next to each other on a horizontal plane. The first circle's text reads: EDR^1 2007-2015. The second circle's text reads: EDR^2 2016-2025. The third circle's text reads: EDR^3 2026-2035.

Slide 3: Increase Efficiencies, Compliance, and Customer Self-Service

- Enterprise case management system
- Enterprise modeling
- Enhanced claims processing and return verification
- New customer service options
- Retire aging legacy systems and outdated technology

Slide 4: Procurement Timeline

2016 Initial Project Planning

2017 Request for Information

2018 Released Project Dates

2019 Request for Proposal

2020 Bidder Final Proposals and Best and Final Offers

Slide 5: Present Day Status

- Selection process
- Notification of Award
- Finishing procurement and Project Approval Lifecycle processes
- Compensation model

Slide 6: Future

- Projected start date – anticipated July 1, 2021
- Projected length – 66 months

Slide 7: Budget - Leveraging Lessons from EDR

- Security and Internal Audit
- Business Process Management
- Organizational Change Management

Slide 8: Video

A video called "EDR² (Enterprise Data to Revenue²) Is Coming Soon!" plays.

Slide 9: Questions?

Slide 10: Public Comment