Correspondence Memorandum

Date: August 26, 2022

To: Budget and Operations Committee

From: Michelle Baxter, Director
Office of Enterprise Initiatives

Subject: Modernization Projects Update

This memo is for informational purposes only. No action is required.

Attached is the Department of Employee Trust Funds modernization project update for the period ending August 31, 2022. This provides the Board an overview of the project highlights, health, major milestones, and key issues and risks.

Executive Summary:

Insurance Administration System (IAS) Implementation project is on track after being replanned. The team completed replanning efforts that included evaluation of the timeline, scope, and deployment options. In addition, discovery sessions with the University of Wisconsin have begun.

Data Management (DM) Program is on target. Focus is on supporting the Insurance Administration project.

Technology Program as previously defined was completed during this period. Additional initiatives have been identified as part of our FY 23 Strategic Plan.

Reviewed and approved by John Voelker, Secretary
Electronically Signed 8/30/22

Board	Mtg Date	Item #
BUD	9.22.22	4

Insurances Administration System Implementation

Highlights
• Deployment of ETF's Marketplace/Benefitplace, the core system, has been completed.
• Benefitfocus and ETF completed several planning sessions to re-evaluate the project deployment strategy and timeline. A formal change request was submitted to move from a wave deployment approach to a single deployment approach and to extend the deployment timeline from August 31.2023 to June 1, 2024 (see updated milestone dates below).
• Benefitfocus and ETF teams held kick off meetings with UW and began discovery sessions.
• Provided a single point of contact for employers through the creation of an employer liaison role and considering the creation of an Employer workgroup.
• Holding biweekly informational meetings with DOA and UWHC leading up to their phased kick off.

Health (After Replanning)				
Overall Health	Schedule	Scope	Budget	Transition Management
On Target	On Target	On Target	At Risk	On Target

Milestones			
Milestone	Start Date	End Date	Status
Phase 0 – Benefitplace core system	08/09/2021	03/31/2022	Completed 6/30/2022
Phase 1 – UW Benefitplace	08/15/2022	05/05/2023	On Target
Phase 2 – Locals Benefitplace	12/01/2022	07/07/2023	Not Started
Phase 3 - Retirees Benefitplace	03/01/2023	11/03/2023	Not Started
Phase 4 – DOA (Star and Non-Star), UWHC Benefitplace	05/01/2023	01/05/2024	Not Started
Deployment	01/01/2024	06/01/2024	Not Started
Project Closure	06/01/2024	03/31/2025	Not Started

Top Risk / Issues			
#	Risk / Issue Description	Severity	Status
1	Staffing - Benefit Focus staff turnover and resourcing project. Staffing plan due to ETF with updated schedule.	High	Monitoring
2	Staffing – ETF staffing is at risk with the extension of the timeline.	High	Monitoring
3	Timeline - Program and policy changes to insurance benefit plans or Third-Party Administrators (TPAs). may impact implementation.	Moderate	Monitoring
4	Timeline – Third-Party Administrators (TPAs) and Employer ability to meet defined timelines.	Moderate	Monitoring
5	High level of process changes for ETF, Employers and Vendors.	High	Monitoring
6	Budget – renegotiating the terms of the contract including the cost of extending the project timeline.	Moderate	Active

Data Management Program

Highlights
• DM program continues to be on target. • Master Data Management (MDM) project was completed during this period. • Data Governance project staff continue to incorporate MDM and Reference data into Governance Framework. • Data Quality project staff continue cleanup for top Insurance data elements for IAS Enrollment and Eligibility and working on Data Quality Framework. • Data Literacy project staff continue to focus on smaller and more frequent training.

Health

Overall Health	Schedule	Scope	Budget	Transition Management
On Target	On Target	On Target	On Target	On Target

Project Milestones

Milestone	Start Date	End Date	Status
Data Storage, Warehouse, and Business Intelligence	11/08/2019	12/29/2023	On Target
–Organization and Insurance Data Domains, myETF	07/01/2022	9/30/2022	On Target
Other Domains and Milestones - TBD	10/03/2022	11/30/2023	Not Started
Project Closure	12/01/2023	12/29/2023	Not Started
Data Governance	02/08/2019	12/29/2023	On Target
Enhance Data Governance Framework	01/03/2022	12/22/2023	On Target
Operationalize Data Governance Activities	07/01/2022	12/04/2023	On Target
Project Closure	12/11/2023	12/29/2023	Not Started
Data Quality	01/14/2019	12/29/2023	On Target
Data Quality and Supporting Metrics	01/03/2022	12/29/2023	On Target
Data quality control points rules prioritization, review, and modification	01/03/2022	12/15/2023	On Target
Data Cleansing	01/03/2022	10/23/2023	On Target
Future data quality framework	01/03/2022	12/29/2023	On Target
Operationalize data quality activities	01/02/2023	12/28/2023	Not Started
Data Literacy	04/05/2021	12/29/2023	On Target

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Resource availability – specifically subject matter experts and data stewards	Moderate	Monitoring
2	Data integration complexity	Moderate	Analyzing

Technology Program

Highlights
Technology program as previously defined, and all associated projects have been completed. New initiatives have been identified as part of ETF's FY23 Strategic Planning efforts. • IT Ops Model project was completed. • GitHub (a code repository tool) implementation project was completed. • Creation of Security Standards, Procedures & Guidelines project was completed. • Okta (Identity Management Solution) implementation project was completed.

Health				
Overall Health	Schedule	Scope	Budget	Transition Management
Completed	NA	NA	NA	NA

Project Milestones		
Milestone	End Date	Status
TP 2 - IT Operational Model	06/30/2022	Completed
TP 3 - GitHub Implementation	07/29/2022	Completed
TP 6 - Security Standards, Procedures & Guidelines	06/30/2022	Completed
TP 8 - OKTA	08/30/2022	Completed