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Correspondence Memorandum

Date: June 15, 2023
To: Budget and Operations Committee
From: Michelle Baxter, Director
Office of Enterprise Initiatives
Subject: ETF Modernization Projects Update

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

Below is the Department of Employee Trust Funds' (ETF's) modernization project update for the period ending May 31, 2023. This provides the Committee with an overview of the project highlights, health, major milestones, and key issues and risks.

Executive Summary

The Insurance Administration System (IAS) Implementation project continues to be on track, although an additional risk related to operational readiness has been identified. Please reference the "Insurance Administration System (IAS) Update" memo ([Ref. GIB | 05.17.23 | 8A](#)) to the Group Insurance Board on May 17, 2023, for additional details.

The Data Management (DM) Program overall is on track and three projects will be completed this year and the overall program closed; one project will remain active through 2024. Focus is on supporting data for the IAS project. The Data Storage, Warehouse, and Business Intelligence project is seeing some delays due to staff turnover. There is moderate risk that IAS reporting required to perform business operations will not be readily available on the IAS "go-live" date. The team will be prioritizing necessary reporting and the timing in which such reporting is required, deferring non-daily reporting past the "go-live" date. This level of prioritization is normal and there is a planned IAS post go-live period to address remaining reporting needs.

A key dependency to successfully deliver IAS and ensure members' identities are secure is being accomplished through the Identity Proofing project, Strategic Initiative

Reviewed and approved by John Voelker, Secretary
Electronically Signed 06/19/23

Board	Mtg Date	Item #
BUD	06.22.23	5

4.3.5, and is being reported here for reference. The project was delayed due to vendor issues with the proof-of-concept activities but is now in the contract negotiation phase and on track to be implemented on time for the IAS testing in December.

IAS Implementation

Highlights

- Completed UW enrollment and eligibility platform configuration and testing.
- Completed Locals enrollment and eligibility platform configuration and testing.
- Continue to meet with DOA and UWHC providing project updates, pre-planning, demonstrations, and review of technical specifications.
- Began implementation projects with the remaining 5 vendors, all vendors are now in progress. These vendors consist of health insurers, benefit administrators, and Merative (data warehouse).

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
Phase 0 – Benefitplace core system	08/09/2021	03/31/2022	Completed 6/30/2022
Phase 1 – UW Benefitplace	08/15/2022	05/18/2023	Completed
Phase 2 – Locals Benefitplace	12/01/2022	06/16/2023	Completed
Phase 3 - Retirees Benefitplace	03/01/2023	11/03/2023	On Target
Phase 4 – DOA (Star and Non-Star), UWHC Benefitplace	05/01/2023 07/16/2023	01/12/2024	Not Started*
Operational Readiness	08/09/2021	06/01/2024	At Risk
Deployment	01/01/2024	06/30/2024	Not Started
Project Closure	06/01/2024	03/31/2025	Not Started

*Preliminary work has started, official start with BenefitFocus is scheduled for July.

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Billing – Vendor has an unproven billing solution, and early indications of functionality are concerning.	High	Developing Mitigation

#	Risk / Issue Description	Severity	Status
2	Resources – Maintenance of current system, operational capacity, and competing initiatives	High	Monitoring through enhanced governance oversight
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	Operational Readiness - High level of process changes and acceptance of such changes for ETF, Employers and Vendors.	High	Enhanced Transition Management effort underway
6	Operational Readiness – ETF staff roles and responsibilities are defined, end to end processes documented and agreed upon, and staff trained	Moderate	Key roles being defined; priority future state processes identified, training plan and materials being developed

DM Program

Highlights

- DM program resource health is at risk because of resource constraints. Overall health is on track. The team is monitoring.
- Data Storage, Warehouse, and Business Intelligence project has been extended through December 2024.
- Data Quality project staff continue cleanup for top insurance data elements for IAS Enrollment and Eligibility.
- Data Literacy project staff continue to focus on smaller and more frequent training.

Health

Overall Health	Schedule	Scope	Budget	Transition Management
At Risk	At Risk	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
Milestone 10 - Organization, Insurance, myETF	07/01/2022	9/30/2022	Complete
Milestone 11 – myETF in Data Lake DEV	10/03/2022	12/30/2022	Complete
Milestone 12 - IAS	01/02/2023	03/31/2023	Complete
Milestone 13 - IAS	04/03/2023	06/30/2023	At Risk
Milestone 14-19 – TBD*	07/03/2023	11/30/2023 11/29/2024	Not Started
Project Closure	12/01/2023 12/01/2024	12/31/2023 12/31/2024	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	12/01/2023	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 / Late
Project Closure	12/01/2023	12/29/2023	Not Started
Data Literacy	04/05/2021	12/29/2023	On Target

*Additional sprints have been added extending the project by one year to meet original business goals.

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Resource availability – specifically developers, subject matter experts and data stewards	High	Monitoring through enhanced governance oversight

#	Risk / Issue Description	Severity	Status
2	Data integration complexity	Moderate	Monitoring

Identity Proofing

Highlights

- Vendor selected and contract negotiations are underway.
- Working with Department of Administration (DOA) and Division of Enterprise Technology (DET) to align agency's respective needs, requirements, and timelines, however ETF will be moving forward with implementing their own solution as the enterprise project has been put on hold.

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
Phase 1: Request for Information	9/19/2022	10/05/2022	Complete
Phase 1: Vendor Demonstrations	10/6/2022	11/11/2022	Complete
Phase 1: Proof of Concept(s)	11/14/2022	2/21/2023 3/10/23	Complete
Phase 1: Recommendation	2/22/2023	3/13/2023	Complete
Phase 2 Develop Project Execution Schedule	3/13/2023	4/25/2023 7/15/2023	On Target
Phase 2: Implementation	7/15/2023	12/29/2023	Not Started

Top Risk / Issues

#	Risk / Issue Description	Severity	Status
1	Resource availability	Moderate	Monitoring
2	Timeline – project timeline will need to be extended due to contracting issues for the proof of concept. This does not impact any other project.	Low	Reviewing Timeline for adjustment

#	Risk / Issue Description	Severity	Status
3	Operational Readiness – ETF staff roles and responsibilities are defined, end to end processes documented and agreed upon, and staff trained	Moderate	Key roles being defined; priority future state processes identified, training plan and materials being developed

Resolved Risks / Issues

Risk / Issue Description	Result
Timing of enterprise project (DOA/DET) and impact	ETF will implement their own solution to meet modernization timeline. Will monitor future progress.

Staff will be at the Committee meeting to answer any questions.