Group Insurance Board
February 19, 2014

Robert J Marchant   Deputy Secretary

Bob Martin   Director, Office of Enterprise Initiatives
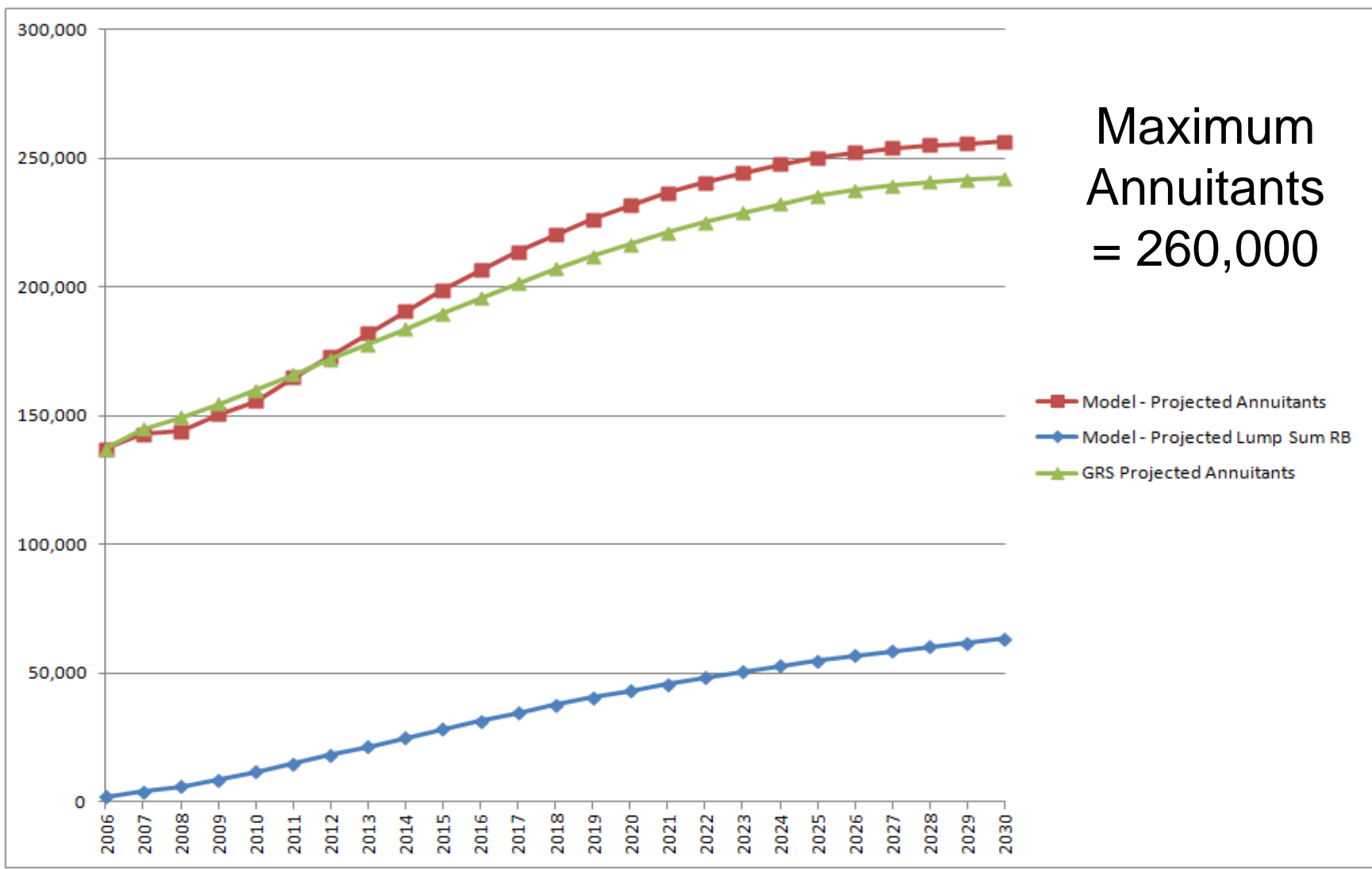
ETF Vision Statement

To become a leader among large public employee benefit systems by offering best practice customer services to our members

ETF Strategic Priorities and Goals

Provide WRS members with secure online access to their account, including the ability to securely update information online

Volume - Projected Population

Maximum Annuitants = 260,000

Legend:
- Model - Projected Annuitants
- Model - Projected Lump Sum RB
- GRS Projected Annuitants

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Imaging/Workflow System
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DOB: [ ]	Gender: [▾]	DOB: [ ]	Gender

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Member Summary

Member Name	SSN	DOB	DOD	Gender	Party ID	Partner Name	SSN	DOB	DOD	Gender	Party ID	Source	Term Date

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"Apple is a very disciplined company, and we have great processes. But that's not what it's about. Process makes you more efficient"

-- Steve Jobs

Transformation, Integration and Modernization (TIM) Overview

Bob Martin - Director, Office of Enterprise Initiatives
Department of Employee Trust Funds

Conceptual Department View

Secretary's Office

Leadership Team/TIM Steering Team

OEI

- Strategic Planning
- Project related Communication
- Data Management
- Business Transformation
- Vendor Management
- Project Risk Management

Retirement Services (DRS)

Insurance Services(DIS)

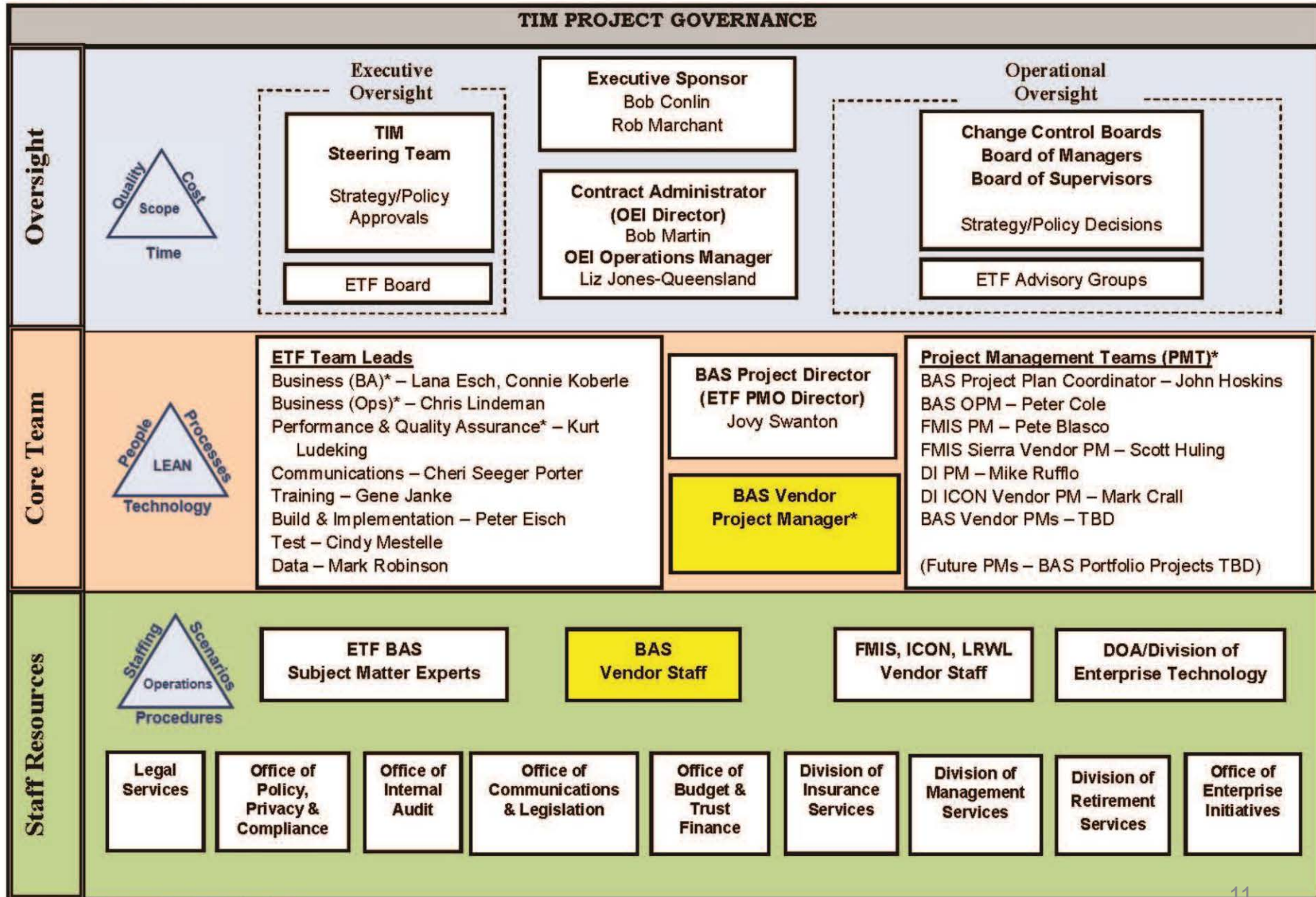Management Services (DMS)

Offices Of…

TIM

PMO

Office of Enterprise Initiatives (OEI) - dedicated to cross functional efforts
Transformation, Integration and Modernization (TIM) – overall "portfolio" of projects

OEI/PMO Key TIM Initiatives

- TIM – Transformation, Integration and Modernization
    - ETF Strategic Partner (LRWL)
    - Financial Management Information System (FMIS)
    - Data Integrity Project (DI)
    - Benefits Administration System (BAS)
    - Enterprise Business Model (EBM)

- Data Governance
    - Data Stewards Council (DSC)
    - Data related policies/procedures
    - Data Management

- Day to Day Projects – approximately 20

Resource	FY2013						FY2014							
	Jan 2013	Feb 2013	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sep 2013	Oct 2013	Nov 2013	Dec 2013	Jan 2014	Etc.
Period Activity	RFP Development & Delivery						RFP Response			BAS Vendor Selection	BAS Implementation Planning to Begin			
LRWL	Develop/Deliver BAS RFP						Procurement Assistance				Oversight PM			
BAS Vendor						RFP					BAS Vendor to Begin Implementation Plan			
EBM Team	Create/Deliver Logical Scenarios (Enterprise Business Model - EBM)						Resolve carryover scenario issues; Gather rules from DI / others; maintain scenarios				Support BAS; integrate/QA scenario mapping			
Data Integrity	Develop Plan and Begin Execution of Data Integrity Project													
FMIS	Procure FMIS & Implementation Partner		Plan & Implement FMIS Solution											
ETF-OEI	*TIM Activities Oversight, Leadership & Ongoing Communications*													
IT Support	Legacy Support and Enhancements												BAS	

TIM PROJECT GOVERNANCE

Oversight

Executive Oversight

TIM Steering Team

Strategy/Policy Approvals

ETF Board

(Quality, Cost, Scope, Time triangle)

Executive Sponsor
Bob Conlin
Rob Marchant

Contract Administrator (OEI Director)
Bob Martin
OEI Operations Manager
Liz Jones-Queensland

Operational Oversight

Change Control Boards
Board of Managers
Board of Supervisors

Strategy/Policy Decisions

ETF Advisory Groups

Core Team

(People, Processes, Technology — LEAN triangle)

ETF Team Leads
Business (BA)* – Lana Esch, Connie Koberle
Business (Ops)* – Chris Lindeman
Performance & Quality Assurance* – Kurt Ludeking
Communications – Cheri Seeger Porter
Training – Gene Janke
Build & Implementation – Peter Eisch
Test – Cindy Mestelle
Data – Mark Robinson

BAS Project Director (ETF PMO Director)
Jovy Swanton

BAS Vendor Project Manager*

Project Management Teams (PMT)*
BAS Project Plan Coordinator – John Hoskins
BAS OPM – Peter Cole
FMIS PM – Pete Blasco
FMIS Sierra Vendor PM – Scott Huling
DI PM – Mike Rufflo
DI ICON Vendor PM – Mark Crall
BAS Vendor PMs – TBD

(Future PMs – BAS Portfolio Projects TBD)

Staff Resources

(Staffing, Scenarios, Operations, Procedures triangle)

ETF BAS Subject Matter Experts

BAS Vendor Staff

FMIS, ICON, LRWL Vendor Staff

DOA/Division of Enterprise Technology

Legal Services

Office of Policy, Privacy & Compliance

Office of Internal Audit

Office of Communications & Legislation

Office of Budget & Trust Finance

Division of Insurance Services

Division of Management Services

Division of Retirement Services

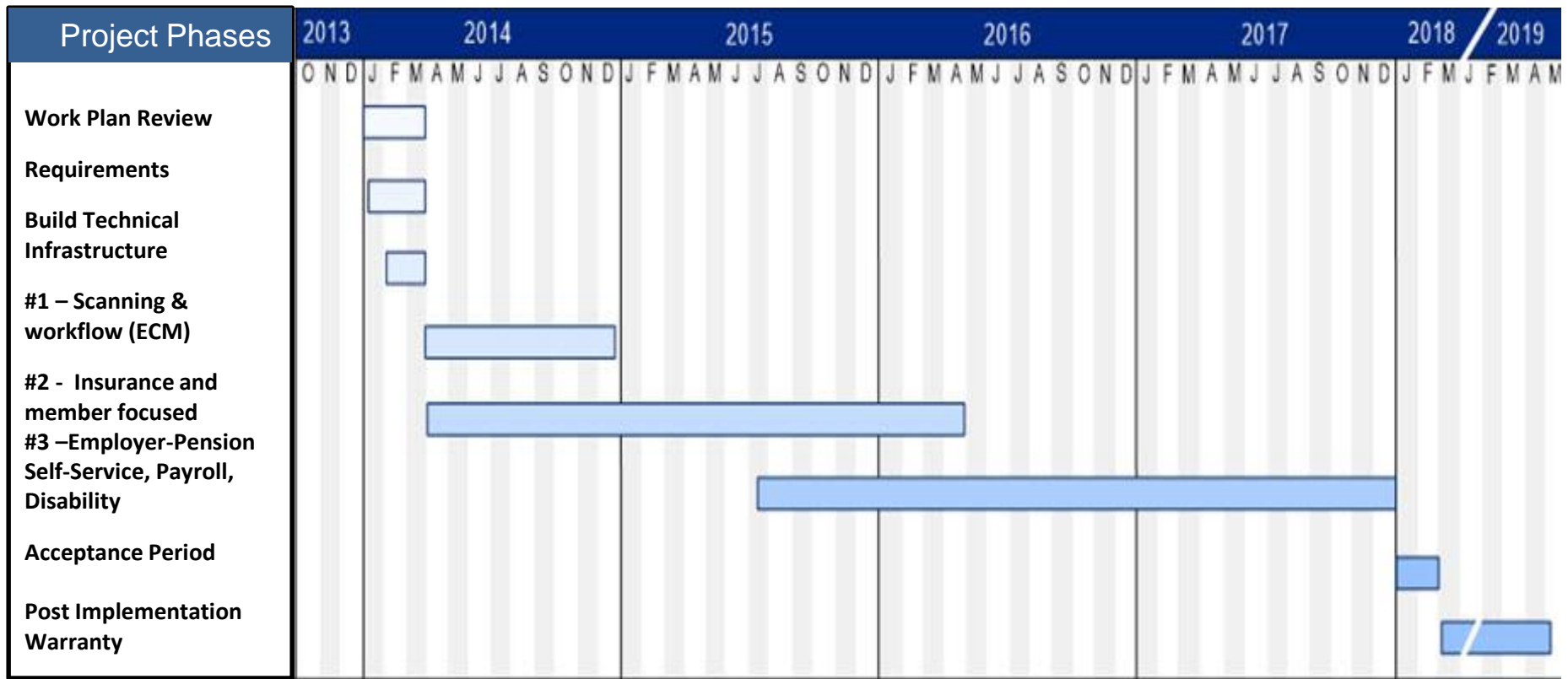**Office of Enterprise Initiatives**

* = Staff assigned to PMO

High-level Timeline - 2014

- January 2014
  - Finalize vendor contract
  - Teambuilding
  - Project team space build-out/moves
  - Vendor on site
- February 2014
  - Begin detailed design
- December 2014
  - First deliverable – Enterprise Content Management

Hypothetical Project Phasing

Project Phases	2013	2014	2015	2016	2017	2018	2019
	O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M A M J J A S O N D	J F M	J F M A M

Work Plan Review

Requirements

Build Technical Infrastructure

#1 – Scanning & workflow (ECM)

#2 - Insurance and member focused

#3 –Employer-Pension Self-Service, Payroll, Disability

Acceptance Period

Post Implementation Warranty

Group Insurance Board

Questions?

Contact: Bob.Martin@etf.wi.gov