

Public Agenda Item #17

Consideration of Retirement Insurance System Enhancement (RISE) Project Update

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Cathy Terrell, Deputy Executive Director
Robin Hardaway, Director of Customer Benefits
Chuck Turner, Chief Information Officer

ERS partnered with **TELUS Health** in February 2023 and recently completed the 1st year of the project.

The RISE project will complete in 2030 and will replace the:

- Internal administration software used by ERS staff
- Member and retiree portal
- Employer/Vendor interface

RISE Project Update

Enhancements to Customer Service and Operations



The RISE Project will enhance customer service and operations by:

- Improving and expanding online functionality to members and agencies
- Improving the integration of pension and benefit services
- Creating a 360-degree view of activity allowing ERS staff to better support incoming phone calls and requests
- Automating more processes and tasks

RISE Project Update

Project Phases



Phase 1: Project Initiation and Planning – Project kickoff and planning - **COMPLETE**

Phase 2: Fit Gap Activities – Validate ERS requirements - **COMPLETE**

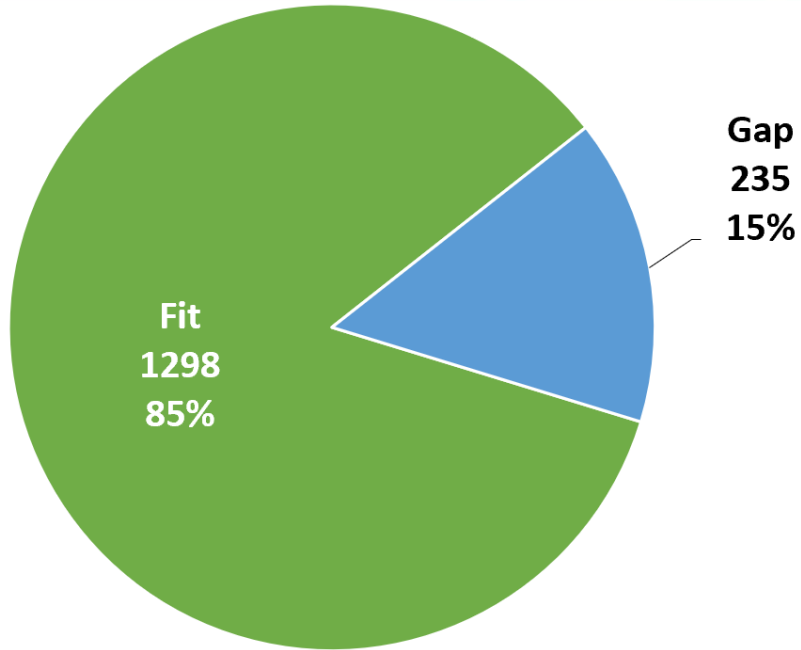
Phase 3: Environment Provisioning – Prepare environments for project activities and production

Phase 4: RISE Solution Delivery – Delivery or working solution, demonstrations, testing, training, and organizational readiness

Phase 5: Production Implementation – Deploy the new solution into production

RISE Project Update

Phase 2 Fit/Gap Breakdown



Total ERS Requirements - 1533

Fit – Requirement can be met with **standard configuration** to the base solution.

Gap – Requirement can be met with **additional configuration or customization** to the base solution.

Phase 3: Environment Provisioning

- TELUS Health will set up the necessary software and environments to support development, testing, and training.
- The production environment will host, maintain and upgrade the system as necessary.

Phase 4: RISE Solution Delivery

- A multi-year phase that will configure and develop the pension and benefits solution with functionality reviewed and tested by ERS.
- Includes training, change management, and readiness activities for all users of the system

Phase 5: Production Implementation

- Activities to prepare for and deliver the system into production.
- Final cutover from the current system to the new system ensuring business processes, data and supporting technologies are transitioned successfully.

RISE Project Update

Management and Oversight



- RISE activities are guided by ERS leadership and supported by staff and consulting resources, in addition to TELUS project staff
- Project management and overall coordination of RISE activities are performed by ERS and TELUS Health project managers.
- Gartner was selected to perform Independent Verification and Validation (IV&V) to help ensure its successful completion.

RISE Project Update

Organizational Effort



- The RISE Project involves approximately 65 staff from Customer Benefits, Finance, and Information Systems.
- Resources are required for working on the project and maintaining current system/operations. We will need to adjust resources throughout the project to meet required needs.
- Succession planning built into the project.

Discussion