



**Public Employee Retirement System of Idaho
(PERSI)**

607 North 8th Street
Boise, Idaho 83702



Dates of Engagement
1997 – 2001

Purpose / Objectives

- Procurement assistance
- Contract negotiations
- Project monitoring, quality assurance and oversight responsibility
- Long term IT planning and process engineering

Nature of LRWL Services

LRWL provided assistance in developing an approach to procuring a new information system to support PERSI's needs in the areas of Membership and Benefits. Responsibilities included:

- Determining functional and project requirements
- Reviewing the PERSI-prepared RFP and providing appropriate input
- Assisting in the conduct of the procurement
- Assisting in developing and applying the evaluation criteria and selection methodology
- Negotiation of a contract
- Assistance in overall project management oversight
- Quality assurance in the implementation phase.

Specific activities related to quality assurance included:

- Attendance at requirements sessions to ensure the quality of both the process and the products
- Review of development methodology standards
- Comment on the distributed development approach
- Review appropriateness and adequacy of data conversion and data bridging approaches, as well as data cleansing approach
- Review and comments on analysis, design, and construction products
- Review of training and testing plans and the actual delivery of training and testing
- Measure adequacy of project implementation plans and review progress against such plans
- Monitor project staffing in terms of the size of the staff as well as the appropriateness and location of the client and vendor resources.

A unique aspect of this project included the "melding" of PERSI and contractor / consultant staff in the development effort in a cohesive team. Four PERSI staff members worked in concert with up to 25 of the developer's staff.

Additional activities included developing a long term Information Technology Plan (reflecting PERSI's Strategic Business Plan) to support activities after the new Membership and Benefits application was implemented. LRWL assisted PERSI in developing project descriptions, definitions, and approaches, defining resource requirements, preparing project and consolidated budgets, evolving schedules, etc. to utilize technology to enable business process re-engineering plans. Focus groups involving the executive management team were facilitated by LRWL as part of this effort.