



State of Indiana
Public Employees' Retirement Fund
(PERF)
Indiana State Teachers' Retirement Fund
(TRF)

143 West Market St., Suite 800
Indianapolis, IN 46204 (PERF)



Dates of Engagement
1997 – 2002, 2006 – 2007

Purpose / Objectives

- Procurement assistance
- Project monitoring
- Oversight project management
- Feasibility analysis

Nature of LRWL Services

LRWL assisted in the evaluation and contract negotiation with two finalist bidders for a new, fully integrated (data, imaging, work flow, employer remote reporting) administrative system for the Public Employees' Retirement Fund (PERF) and the Teachers' Retirement Fund (TRF) - and then managed / monitored / quality assured the overall effort. Activities included:

- Reviewing bidders' proposals
- Facilitating review sessions with PERF/TRF staff, state Information Systems staff, counsel, etc.
- Identifying major shortcomings and under scoping / under bidding and facilitating their rectification
- Ensuring level playing fields in terms of the comprehensiveness of the technical and cost approaches
- Ensuring that warranties for software and services were comprehensive and complete
- Introducing and ensuring the appropriateness of outsourcing components to ensure success
- Reviewing contracts and exhibits from business perspectives
- Identifying and justifying the cost of the new system to various state oversight agencies and Boards
- Assisting in the unique approach where two separate agencies supporting eight different funds (7 at PERF and 1 at TRF) jointly develop a common system
- Assisting in developing a common vision for the project – from both agencies' perspectives
- Monitoring and managing the implementation from the State's perspective with a series of additional project managers reporting to LRWL:
 - ✓ TRF Project Manager
 - ✓ PERF Project Manager
 - ✓ DOIT (Division of Information Technology) Project Manager
 - ✓ Implementation Project Manager
 - ✓ Quality Assurance Consultant
- Directing development of an RFP for Backfile Conversion services to convert paper, microfilm, and microfiche to electronic images.

Additional activities included developing plans for Call Center, Data Center, and Data Cleansing efforts, as well as providing on-site operations support (to PERF) to the membership, benefits, and financial areas including removing/eliminating low value activities, developing new and improved processes and, and implementing a standardized set of metrics to measure, report, and manage-to for monthly, year-to-date, and last-year to this-year activities, i.e., refunds processed, accessions to membership and benefits payroll, terminations, etc.

Recently, LRWL was retained to assist PERF in identifying alternate mechanisms to provide retirement operations, IT delivery, counseling, etc. Alternatives include replacing current systems, enhancing current systems, outsourcing IT, outsourcing service delivery mechanisms, etc.