



**Massachusetts Teachers' Retirement System  
(MTRS)**

69 Canal Street, 3<sup>rd</sup> Floor  
Boston, MA 02114-2006



**Dates of Engagement**  
2005 – Present

**Purpose / Objectives**

- Evaluate the recently terminated eRetirement System Project and provide a lessons learned analysis
- Develop a comprehensive five-year Strategic Technology Plan
- Develop Go Forward Recommendations
- Develop an RFR for the implementation of the recommended solutions

**Nature of LRWL Services**

LRWL was engaged by MTRS to conduct a review of the suspended eRetirement System Project, begun in 2002, which was premised on a customized development approach. LRWL assistance is focused on developing plans and strategies for moving forward with the implementation of a new pension solution. LRWL activities include:

- Perform an extensive evaluation of the eRetirement project addressing all areas of the project including
  - ✓ Scope
  - ✓ Approach
  - ✓ Resources deployed
  - ✓ Management
  - ✓ Technology choices
- Deliver a comprehensive report of evaluation, including specific findings, lessons learned and recommendations for improvement
- Develop a comprehensive five-year Strategic Technology Plan, including
  - ✓ Technology “road map” with estimated costs
  - ✓ Disaster recovery strategies and associated costs
  - ✓ Recommended internal/external IT resources necessary to implement the five-year Plan
- Develop Go Forward recommendations
  - ✓ Research and analyze all available options (e.g. package, custom, hybrid, components) for updating and/or replacing legacy system
  - ✓ Present the pros and cons of each option
  - ✓ Recommend best option for effective use of technology to meet statutory requirements and strategic business objectives
- For the recommended option, provide a detailed plan, defining
  - ✓ Implementation approach, including all components/phases and the estimated time and costs associated with each
  - ✓ Technology solution including architecture design, hardware, software, and hosting recommendation
  - ✓ Detailed data conversion plan supporting the recommended architecture, design, and approach
  - ✓ Detailed staffing plan
  - ✓ Develop an RFR for the recommended option including a comprehensive line of business solution including imaging, workflow, and a paper-to-image backfile conversion.