MEMORANDUM

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To:	General Government Subcommittee Joint Committee on Ways and Means
From:	Joint Legislative Committee on Information Management and Technology
Date:	February 5, 2016
Subject:	PERS Technology Maintenance and Enhancement Project Request JLCIMT Recommendations

The Joint Legislative Committee on Information Management and Technology (JLCIMT) recommends incremental, conditional approval of the Public Employees Retirement System (PERS) Technology Maintenance and Enhancement Project request, assuming the funding and spending authority are made available to PERS by the Joint Committee on Ways and Means.

Specifically, the JLCIMT recommends that a plan be developed to unschedule the requested expenditure limitation and that the agency be required to request the Department of Administrative Services (DAS), Office of the State CIO (OSCIO) and Legislative Fiscal Office (LFO) approval, that a portion, or all of the remaining unscheduled expenditure limitation, be rescheduled for the agency to use once the following specific recommendations are completed. The JLCIMT further recommends that PERS:

- Develop a detailed description of PERS plans and strategies for modernizing its Oregon Retirement Information Online Network (ORION) and jClarety benefit administration system architectural assets, including a high-level timeline for upgrading jClarety's technical architectural (including technical debt). PERS should also clearly document how Hewlett-Packard's modernization plans for jClarety fit into PERS overall plans for ORION Modernization.
- Clearly define the scope of work to be completed by Hewlett-Packard in addressing the five initial "technical debt" issues.
- Develop a solid project charter (including high-level schedule and budget) to provide a clear picture of the work to be completed by Hewlett-Packard related to jClarety "technical debt."
- Regularly report "project status" to the OSCIO and LFO on progress on dealing with the five priority "technical debt" issues.
- Regularly report "project status" to the OSCIO and LFO on progress on the remaining three lower priority "technical debt" issues.
- Produce a final post information review (PIR) and "lessons learned" report after all eight "technical debt" issues are addressed.