

Project Closeout Report

Submitted to Project Oversight on 04/08/2025

GENERAL INFORMATION

Project Name: Teachers' Fund for Retirement Pension Administration System Replacement (RIO-TFFR PAS)

Agency Name: Retirement and Investment Office

Project Sponsor: Chad Roberts

Project Managers: Aaron Kielhack (State), Sriram Ramanujam (Sagitec), Chris Fikes (Segal)

PROJECT DESCRIPTION

The Retirement and Investment Office Teachers' Fund for Retirement (RIO-TFFR) seeks to replace their legacy Pension Administration System (PAS) with a new solution that met current and upcoming business needs. In June 2021, a Request for Proposal (RFP) was issued by RIO-TFFR to procure and implement a modernized PAS utilizing a commercial off-the-shelf (COTS), modified off-the-shelf (MOTS), or software as a service (SaaS) solution with abilities to fit TFFR's business needs. Following the State's Procurement and Evaluation methodology, Sagitec Solutions was the chosen vendor, and a contract was executed between the State of North Dakota and Sagitec Solutions in March 2022. The project officially started on April 4, 2022, and a formal project kickoff meeting was held onsite at RIO-TFFR among the various parties (i.e., RIO-TFFR, North Dakota Information Technology (NDIT), Sagitec and Segal) on May 16-17, 2022. After two and a half years of planning, data conversions, design reviews, development, and various types of testing the new system, myTFFR went live on February 10, 2025, with minimal issues.

SCHEDULE AND COST METRICS

	Project Start Date	Baseline End Date	Baseline Budget	Funding Source	Actual Finish Date	Schedule Variance	Actual Cost	Cost Variance
Original Baseline	September 29, 2020	October 2, 2024	\$9,000,000	Special	April 1, 2025	12.3% Behind	\$8,862,231	1.5% Under
Final Baseline		December 19, 2024	\$9,051,325	Special	April 1, 2025	6.6% Behind	\$8,862,231	2.0% Under

Notes:

The change in budget was from the addition of Azure B2C authentication, additional months of year 3 implementation hosting, the addition of the electronic content management (ECM) integration-migration deliverable, Pay Codes development to Pilot 4 development.

MAJOR SCOPE CHANGES

Scope Changes:

- Changes to ECM for the new system – creation of new document classes, conversion-migration was needed.
- The need for Pay Codes to be a part of Employer Self-Service – more development, testing and coordination with the software vendors of the systems used by the Employers.
- Changes to the Twilio short code and SMS messaging services impacted the budget.
- There were deferred items from Pilots 1-4, which became their own deliverable- due to the delay in the schedule, those items were completed prior to go live.

OBJECTIVES

Business Objective	Measurement Description	Met/ Not Met	Measurement Outcome
Create and enhance functionality of Member and Employer self-service portals to meet the needs of citizen user groups (active and retired teachers and employers).	Increase new member logins by 20% within one-year of go-live.	Met	Already in progress after a month in production- even before mass communications sent out to all Members (teachers).
	Beginning one-month post go-live, IT staff will run monthly reports to determine use of self-service functionality. Counts will be taken by members (active and retired teachers) and by employer accesses.	Met	1,190 unique Members have already accessed/ used myTFFR – this is even before the “grand opening”. IT and RIO-TFFR staff have been able to support/answer nearly all issues/questions from users.
Reinvent and transform the way TFFR conducts business by redefining business plan and processes to increase efficiencies.	One year post go-live, decrease time spent on manual tasks by 10-15%.	Met	Already seeing a major decrease in the first month, well over 10-15%
	Baseline processes that were automated; compare to manual process (before automation) as identified during business process modeling.	Met	Processes as identified during BPM and part of scope were automated. Also, tasks that took months to complete previously, now take hours or days to complete.
Provide an interactive web-based solution that is accessible from multiple device types.	Implement a solution that uses modern technology. RIO	Met	myTFFR has successfully replaced CPASS, the legacy system
	The current PAS is client server based and uses an old technology that limits functionality and the ability to support desired citizen experience; and support pension administration best practices.	Met	Over 80% of Employers have used the new system since go live (124 – reported) – 80% rate.

KEY LESSONS LEARNED AND SUCCESS STORIES

A lessons learned effort is performed after the project is completed. This process uses surveys and meetings to determine what happened in the project and identifies actions for improvement going forward. Typical findings include, “What did we do well?” and “What didn’t go well and how can we fix it the next time?”

Key Lessons Learned and Success Stories	
RIO's staff is small. Staff members were expected to complete their current duties along with the many additional duties associated with the PAS project.	The following issues would have worked better if ESS had been completed earlier: Testing with the employers would have been extended and completed, not so rushed and stressful; Software vendors and NDIT would have had sufficient time to develop their programs.

Key Lessons Learned and Success Stories

	<p>If the Committee had known their responsibilities earlier, communication templates with the employers could have been developed earlier, and UAT training was scheduled and completed during the year-end closeout - not good for Fiscal/Employer Accounting (closing accounts, getting files to external auditors, actuaries, external auditors in-house, etc.).</p> <p>More visibility and communication about the overall project schedule / workplan; and the corresponding time-commitment that would be needed throughout the entire project.</p>
One area for improvement would be better balancing the UAT phase with ongoing development efforts.	While starting the Pilot UAT earlier was beneficial to the project, it added workload on both the teams – NDRIO and Sagitec. Managing UAT testing, issue resolution, and simultaneous design discussions and development of future modules were created challenges. All stakeholders handled these challenges well and drove project to the finish line. A more structured approach to phase alignment could help optimize efficiency and reduce pressure on all stakeholders.
Good team chemistry and continuity by all parties (i.e., Segal, Sagitec and TFFR) was of tremendous value to the project.	<p>Great executive leadership and sponsor involvement by TFFR and ESC</p> <p>Great team involvement by all TFFR staff; and each area took ownership throughout UAT and Cutover activities.</p>
Early efforts with Employer Outreach, communication, working sessions, etc.	Paid dividends as a larger portion of employers were ready for Employer Reporting and new file-layouts, requirements, process, etc.
During the User Acceptance Testing (UAT) and Life Cycle testing phases, a few design refinements were introduced, which impacted timelines and quality considerations.	Finalizing requirements earlier can help mitigate potential risks and improve overall project efficiency.
Employers- comparison of members with the DPI/ESPB database for current license information, RIO-pay codes - eligible salary only, employer has to enroll members (no paper forms on pension side MAF)-active members and retired returned to teach members, employer terminates members, when files are uploaded the employer must pay the balance owed, if employers do find where errors were reported, they report the adjustments needed to RIO on the portal, employer must enter monthly hours for retired return to teach members to ensure maximum hours are not exceeded, and salary and other documentation needed for retirements are completed on the portal.	
Members use the portal to view and update demographic data (no paper forms), staff does not have enter information from paper forms which eliminates input errors (cannot read member writing or finger flubs), the active member database is compared with NDPERS to identify dual members (was a time intensive process), all documents must be received in the system for a process to be completed, necessary approvals were programmed into the system for a process to be completed, medical information needed for disabilities is handled through a secure portal with the medical consultant - we do not have to store sensitive HIPA information, necessary timelines are met - example wait 120 days for refunds to be issued, and automated communications are generated for processes - sent to portal, emails - saves dollars for postage, benefit payments-refunds are automatic through ACH- only checks are issued to third parties - rollovers.	
Since we have gone live, time to process transactions has been decreased.	
The current legacy system (CPAS) was not meeting TFFR's needs and there was not a clear migration, upgrade path, etc. and now with the new system (NeoSpin); TFFR has a partner and solution for both the short-term and long-term.	
Online adoption of self-service portals has significantly helped NDRIO with the overall efficiency to serve members and employers.	

Key Lessons Learned and Success Stories

Collaboration between RIO, Sagitec, NDIT, and Segal played a very crucial role.

Everyone stepped-up; but not sure at the beginning of the project if everyone truly knew the amount of time and effort that was going to be needed. TFFR has a lot to be proud of...and it starts with them and their staff. Congratulations!