

**Public Employees' Retirement Board  
April 28, 2016**

**Topic: Change Request - Ventera**

**Staff Recommendation:**

Approve CRF03 (M9-20160411) and the accompanying Memorandum explaining the need to amend the data cleansing contract between MPERA and Ventera.

**Discussion:**

The Change Request is necessary as data reconciliation was not completed within the time frame previously allotted and the PERIS go-live extension from May 2 to July 11, 2016, requires additional services from Ventera.

**Board Motion:**

Uphold Staff Recommendation

Other

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Moved by

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Seconded by

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Vote

# MONTANA PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION



STEVE BULLOCK  
GOVERNOR

DORE SCHWINDEN  
EXECUTIVE DIRECTOR

STATE OF MONTANA



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## MEMORANDUM

FROM: Dore Schwinden, Executive Director  
Montana Public Employee Retirement Administration

DATE: April 20, 2016

SUBJECT: Rationale for CRF M9-20160411

In August 2015, the Montana Public Employee Retirement Administration (MPERA) and Ventera Corporation (Contractor) entered into Addendum Number 4 to the parties' Contract for Data Cleansing and Migration Services - Contract Number DOA11-21280 (Contract).

Addendum Number 4 recognized that Contractor required extra time to complete Contract in order to convert MPERA's data from "staging" to PERIS and to program data reconciliation queries in the "staging" data tables through the completion of User Acceptance Testing (UAT). The parties agreed that MPERA would pay Contractor an additional \$80,000: \$40,000 upon satisfaction of UAT entrance criteria; and the remaining \$40,000 after either (1) the reconciliation of all data or (2) if 100% reconciliation is not achieved, the resolution of 250 additional Data Mapping Matrix (DMM) Issue Registry Items related to data reconciliation.

Addendum Number 4 specifically provided that in the event the 250 additional DMM Issue Registry Items are completed without achieving 100% reconciliation of all data, the parties would engage in negotiations concerning the additional work needed to reach 100% Data Reconciliation.

Addendum Number 4 further specifically provided that in the event PERIS's scheduled go-live date of May 2016 is extended for any reason, Contractor could submit a change order and be paid for any work performed after that date.

Contractor has notified MPERA that 250 DMM Issue Registry Items have been completed without achieving 100% reconciliation of all data and MPERA has notified Contractor that the May 2, 2016 go-live date has been extended to July 11, 2016.

Therefore, the parties have agreed to enter into Change Request M9-20160411, the terms of which require Contractor to perform up to 50 additional new Issue Registry items, participate in no more than three 2.5 hour JAD session per week, and participate in no more than two 1-hour Reconciliation sessions per week. The Change Request also requires Contractor to provide the services of Pramod Singhai to MPERA to perform the above-stated duties for up to 24 hours a week until July 1, 2016. In return, MPERA has agreed to pay Contractor an additional \$38,500 - \$19,250 on May 31, 2016 and \$19,250 on July 8, 2016 – assuming completion of the above stated-duties.

# Change Request Form

Project / Opportunity	MPERA Data Reconciliation Support (CRF3)
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Change Request Number	M9-20160411	Date of Request	03/28/2016
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Description of Change:

<ul style="list-style-type: none"> <li>• MPERA has rescheduled its planned cutover / Go-Live implementation from Legacy to PERIS from early May 2016 to early July 2016.</li> <li>• MPERA anticipates additional new IRs to be created from the period March 23rd, 2016 until July 1st, 2016.</li> <li>• MPERA requests Ventera to support the Analysis, Assessment, and Reconciliation coding tasks related to the additional new IRs, that meet the following criteria:             <ul style="list-style-type: none"> <li>○ Data reconciliation on the IR is absolutely necessary and there are no other alternative approaches to determine that the data has been correctly converted from the Legacy database to the PERIS database;</li> </ul> </li> <li>• The number of additional new IRs Ventera will be expected to support will not exceed 50 and may be less depending upon MPERA's prioritization and the size and complexity of each IR. MPERA is primarily responsible for updating the DMM's and Ventera supports this effort through participation in no more than three 2.5 hours JAD sessions per week and no more than two 1-hour Reconciliation sessions per week.</li> <li>• MPERA will determine the priority order of the IRs prior to the assignment of the IRs to Ventera. All work assigned to Ventera during this period will be recorded as a new IR.</li> <li>• Before data reconciliation work is initiated on an IR, both MPERA and Ventera will reach an understanding on the effort in hours required by Ventera to complete work on the IR.</li> <li>• Ventera will provide the services of Pramod Singhai for up to 24 hours per week for the period from April 18th, 2016 until July 1st, 2016 during which time he will support the tasks defined herein.</li> <li>• MPERA's acceptance of Ventera's work for the IRs will be based upon the criteria defined in the DMMs.</li> <li>• Payment schedule: 1/2 payment on May 31<sup>st</sup>, 2016 and 1/2 Payment on July 8<sup>th</sup>, 2016.</li> </ul>
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<b>More Descriptive Details / Documents Attached to Request Form</b>		<b>Yes</b>		<b>NO</b>
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Reasons for Proposed Change :(X)

<b>Problem/Error/Non-conformance (corrective change)</b>	<b>Problem/Error/Non-conformance (corrective change)</b>
	<b>Improvement/Enhancement (perfect change)</b>
	<b>Change in Environment (adaptive change)</b>

X	Other
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**Documents /Deliverables Requiring Update**

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**Estimate of Impact**

Degree of Impact: (X)		Minimal		Moderate	X	Major
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<b>Cost Impact of Requested Change</b>	
<b>Time/Schedule: (Yes/No) (Detail Below)</b>	<b>Dollars: (Yes/No) (Details Below)</b>

<b>Immediate Resolution: (X)</b>		<b>Yes</b>		<b>No – Start Formal Change Control Process</b>
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<b>Full Evaluation Required: (X)</b>		<b>No</b>		<b>Yes – (Enter Estimates Below)</b>
<b>Cost Estimates / Evaluation</b>			<b>Dollars</b>	<b>\$38,500</b>

<b>Name / Recommended Evaluator:</b>		<b>Title:</b>
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**Approvals for Full Evaluation:**

**MPERA:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Supplier:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Evaluation Results**

**Date of Review:**

**Total Approved Cost:**

**Decision :( X):**

	<b>Approved</b>	<b>Rejected</b>		<b>Deferred Until:</b>
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**AGREED TO:**

	<b>MPERA</b>	<b>Ventera Corporation</b>
<b>Signature</b>		
<b>Name</b>		<b>Jeff Smith</b>
<b>Title</b>		<b>Executive Vice President</b>
<b>Date</b>		<b>04/15/2016</b>