



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
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**EXECUTIVE COMMITTEE**  
**ACCOMPLISHMENTS REPORT**  
**2011 YEAR IN REVIEW**

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments achieved in 2011.

**OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS**

- Created a Data Governance Steering Committee to develop policy, standards, metrics, and framework to implement the Data Governance and Data Privacy Program to ensure data quality and security.

**EXPAND OUTREACH TO MEMBERS AND EMPLOYERS**

- Permanently expanded operating hours in the call center to 7:00 a.m. to 5:00 p.m. This change improved members' access to trained benefits specialists, while providing flexible scheduling opportunities for staff.
- Improved access to the dedicated phone line for scheduling an appointment with a benefit specialist by directing the line to staff in the Contact Management Section (call center). Staff handled 5,518 appointment-related telephone calls over the last six months of 2011, with an average "speed of answer" of 1.5 minutes.
- Created new and revised existing informational materials designed to educate members on the effects of the investment markets on Wisconsin Retirement System (WRS) benefits. This effort included a new video, *When Should I Retire?*, which has been viewed 3,566 times since its release in December.
- Created new materials addressing member questions regarding contribution rates in the wake of recent legislative changes. This effort included a new video, *Employee Contributions and WRS Investments*, which has been viewed 1,644 times since its release in November.
- Updated the video, *Medicare and Your WRS Benefits*, which has since been viewed 1,108 times.
- Published three educational videos on changes to the state and local group health insurance programs for 2012. Combined, these titles were accessed more than 5,575 times.
- Handled 4,961 telephone calls via the Employer Communication Center in the last three months of the year, a 44% increase over the same timeframe in 2010. For 2011, more than 12,700 calls from employers were handled.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

  
Signature

2-20-12  
Date

Board	Mtg Date	Item #
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- Many employer trainings were offered throughout 2011 to prepare employers for changes to the annual reporting process resulting from Wisconsin Acts 10 and 32 legislation. These included 136 webinar sessions, 37 in-person trainings, 4 conferences, and 7 payroll council sessions.
- Created an electronic “rush” work basket, which replaced a manual process for routing customer requests for expedited processing. This step allowed for better tracking of such requests and created efficiencies for completing them.
- Redesigned the retirement packet and created a “How to Retire” booklet, which significantly improved the quality of initial communication with members regarding the retirement process.

### **STRENGTHEN INTERNAL WORKFORCE TRAINING**

- Offered 136 staff training sessions with attendance of 1,325.
- Created an ETF Training Council to advise on the planning, coordination and presentation of training to ETF employees.
- Developed and implemented ETF’s project management methodology, templates, and training.
- Purchased new personal computers (PCs) for ETF staff and migrated to the Windows 7 new desktop operating system to enhance staff productivity.
- Addressed record-setting workloads through concentrated workload management, cross-training and redistribution of staff, and the use of overtime funding.

### **MISCELLANEOUS**

- Secured additional space on the third floor at the Department of Revenue Building located on Rimrock Road to accommodate the growth of new hires and to maximize the use of current space at Badger Road.
- Completed a project to calculate and add “Variable-at-Core” data to approximately 34,000 retiree accounts on Benefit Payment System (BPS).
- Completed an extraordinary volume of retirement applications and final retirement calculations:
  - Entered 15,228 “new annuitants” on the payroll in 2011, an increase of 80.5% over 2010.
  - Finalized 12,364 retirement calculations in 2011, an increase of 49.4% in 2010.
- Conducted two informational presentations for staff on preliminary findings of a project that studied female Wisconsin Deferred Compensation (WDC) Program participants’ savings patterns. The project is designed to evaluate how to increase the retirement savings of women. It is funded by a grant from the Social Security Administration’s Financial Literacy Research Consortium.
- ETF was extremely busy in 2011 coordinating and disseminating key communications and updates to members and employers, media, legislators, and other stakeholders about the changes encompassed in Wisconsin Acts 10 and 32. Key projects included new videos that were viewed more than 20,000 times; online “Frequently Asked Questions” documents and other critical publications, which were downloaded tens of thousands of times from the ETF website; and hundreds of media and legislative inquiries and requests.