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CORRESPONDENCE MEMORANDUM

DATE: February 15, 2012
TO: Employee Trust Funds Board
Teachers Retirement Board
Wisconsin Retirement Board
FROM: Anne Boudreau, Deputy Administrator
Division of Retirement Services
SUBJECT: Outreach Program

This memo is for informational purposes only. No Board action is required.

A primary function of the Department of Employee Trust Funds (ETF) is to educate members about their Wisconsin Retirement System (WRS) benefits. Most members ask for assistance when making important retirement-related decisions. Members may contact or visit ETF, and staff now travel to members as part of the Department's Outreach Program.

The Outreach Program currently provides the following services to members on a statewide basis:

- WRS benefit presentations open to the general public.
- WRS benefit presentations for WRS employers or member organizations.
- Benefit fair booths.
- Small group retirement sessions.

Since small group sessions are geared toward members who have an official benefit estimate and are ready to retire, this is the only outreach opportunity requiring an appointment.

DEVELOPMENT OF GROUP SESSIONS

ETF began offering group retirement sessions on a trial basis in August 2003. Initially, sessions were offered only once a week at ETF's Madison office. Later, ETF expanded this to ten per week and offered sessions in Waukesha, where we maintained a small satellite office.

Reviewed and approved by Matt Stohr, Administrator, Division of Retirement Services


Signature : _____ Date 2/17/12

Board	Mtg Date	Item #
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The group sessions have been very successful in several respects:

- Members experience little or no wait time – less than three days – when making reservations for group sessions. In contrast, the wait for an individual appointment can be several weeks.
- Members report positive interactions with others who, like them, are considering such an important decision.
- Members say they benefit from hearing questions asked by others – questions they may not have considered, yet which are relevant to their circumstances.
- ETF makes efficient use of staff time, serving up to 12 members in the time it could serve only 2 members with individual appointments.

EXPANSION OF GROUP SESSIONS VIA OUTREACH

One of the goals of the ETF 2010 – 2015 Vision Statement is “to be more available to more members in more parts of the state in order to provide critical retirement planning, problem solving, and direct education”. One significant step toward this goal was closing the Waukesha office in October 2010 and redistributing the resources to reach more members via an expanded Outreach Program. This program offers more conveniently-located group sessions around the state, for less than the cost of operating the Waukesha office.

In January 2011, ETF expanded the Outreach Program by dividing the state into nine service districts and assigning a Trust Funds Specialist to each district. An exception is the southeast district, which has four staff due to a larger member population and correspondingly greater demand for group sessions.

SUCCESS OF OUTREACH PROGRAM

Each group session accommodates 12 members and their guests. About half of the attendees bring a guest, usually a spouse or a named survivor. (Many are also WRS employees.) To date, we have reached more members via the outreach group sessions (statewide) than what we previously achieved with Madison-only group sessions. Even when Madison group sessions are not filling to capacity, there is a strong demand for services elsewhere in the “field.” In 2011, the 8 group sessions per week in Madison served 2,512 attendees, while outreach audiences totaled 3,691 attendees (guests included).

The attachment includes program attendance statistics and results of a member survey. Note that staff distribute a survey at each group session, inviting each attendee to submit a response.

FUTURE OF OUTREACH PROGRAM

Offering group retirement sessions at locations that are most convenient to our members has been a very successful and cost-effective means of delivering service at a time when demand is increasing.

Using audience statistics and survey information to evaluate the Outreach Program, we developed these goals:

- Increase the Number of Outreach Group Sessions
We will use statistics to schedule group sessions in locations/cities based on member feedback. Our established service district "infrastructure" allows flexibility for adding sessions as demand increases.
- Develop More Specialized Presentations
This year we are planning to add more types of group presentations around the state. These could include offering retiree-specific programs as well as those geared toward new WRS employees and mid-career employees.
- Offer More Live Online Training
ETF conducted a "pilot" group session via webinar this year. There was very strong interest from members. Registration reached maximum capacity shortly after our pre-registration (e-mail) announcement. Feedback from members about the webinar was very good, but we found challenges related to video and audio. Our goal is to reach *more* members, not to create barriers caused by equipment or bandwidth requirements.

One example: Using teleconferencing for audio does not require the member to have special equipment. Without a speaker phone, however, the member has to hold the handset for more than two hours, and the presentation cannot be heard by a spouse or other guest who might be in the same room.

Presenting audio online (using voice-over IP) is inexpensive and does not tie up the member's telephone for the two-hour webinar; however, it does require a member to have speakers on the computer.

2009 – 2011 Outreach Program Statistics

	# Outreach Group Appts	# Outreach Group Members	# Private/ Public Presentation Events	# Private/ Pubic Presentation Members	# Madison Group Appts	# Madison Group Members
2009 Jan-Dec	47	581	63	6,005	193	1,601
2010 Jan-Dec	58	812	74	5,549	188	1,841
2011 Jan-Dec	287	2,366	87	8,661	273	1,574

2011 Outreach Group Session Statistics by District

District	# of Group Appts	# of Total Members	Avg # of Members per Appt	Total Appt Slots Available	Hours Spent in District
SOUTHEAST	98	764	7.80	1,176	585.25
EAST CENTRAL	28	234	8.36	336	188.25
NORTHEAST	29	258	8.90	348	204.75
NORTH CENTRAL	21	189	9.00	252	163.75
NORTHWEST	28	215	7.68	336	226.00
WEST CENTRAL	22	195	8.86	264	197.75
WESTERN	27	207	7.67	324	194.50
SOUTHWEST	23	202	8.78	276	143.25
SOUTH CENTRAL*	11	153	13.91	132	28.50
TOTALS	287	2,417	9.14	3,444	1,932

** Madison is in the South Central district, but groups sessions held at the ETF office are excluded from this total since these are not "outreach" sessions.*

2011 Outreach Group Session Survey Results

	1Q	2Q	3Q	4Q	
<i>*Scale of 1-5, 1=Not Effective 5=Very Effective</i>					
					Average
Presentation's Effectiveness	4.87	4.81	4.88	4.82	4.85
Presenter's Effectiveness	4.93	4.88	4.93	4.9	4.91
Overall Quality and Usefulness	4.88	4.84	4.9	4.88	4.88
	1Q	2Q	3Q	4Q	Total
Number of Surveys Returned	746	731	364	484	2,325

2011 WRS Spring and Fall Public Presentations Member Survey Results

	1Q	2Q	3Q	4Q	
<i>*Scale of 1-5, 1=Not Effective 5=Very Effective</i>					
					Average
Presentation's Effectiveness	n/a	4.69	n/a	4.72	4.71
Presenter's Effectiveness	n/a	4.83	n/a	4.85	4.84
Overall Quality and Usefulness	n/a	4.78	n/a	4.78	4.78
	1Q	2Q	3Q	4Q	Total
Number of Surveys Returned		349		438	787

Other Outreach Program Statistics and Facts

Here are some interesting facts about the first year of the newly-expanded Outreach Program:

- Number of cities around the state regularly used for group sessions: 37
- Total number of cities for all outreach events: 49
- Number of outreach groups scheduled at the beginning of the year: 257
- Number of outreach groups added because of high demand: 30
- Total miles traveled for all outreach (public, group, booth, private): 41,750 miles
- Total expenditures (mileage, meals, hotel, parking, gratuity) for all outreach: \$27,500
- Total time spent doing all outreach: 2,664 hours
- Total number of attendees at all outreach events: 12,900