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EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
July-September 2010

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from July through September 2010. These accomplishments are linked to the objectives identified in ETF's strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Upgraded the Department's call center telephone system to create a more stabilized call management system (application) and to enhance call flow for ETF staff and members.
- Implemented the "myETF Benefits" system, a significant step forward in offering online services. Members covered under the state and local employers group health insurance programs can now go online to view their health benefit information, historical changes related to health insurance coverage, and information on various benefit topics. During the October *It's Your Choice* enrollment period, members will be able to use it to make changes to health insurance coverage.
- Added 14 ETF benefits specialists to the call center application to improve call flow from employers, to serve as a call tracking system for employer related inquiries, and to segregate calls related to the new rollout of myETF Benefits.
- Completed the update capabilities within myETF Benefits for the members and administrators portion of the Health Insurance Electronic Enrollment, Payment and Validation Project (EVP). Provided access to all members and employers, encouraging inquiries and updates be made through the new applications.
- Contracted for consulting services to conduct a Business Risk Readiness Assessment to meet the objectives of our five-year strategic business plan. The assessment will provide a roadmap to migrate systems and mitigate risk as we implement our plan.
- Enhanced the Open Employer Invoices application to display a message indicating when an employer has no open invoices.
- Enhanced the Employer Remittances application to display an employer's over/under balance. This automatically informs employers about their balances when they log on to the ONE site (when entering Monthly Remittance Reports), reducing ETF staff time involved in follow-up calls.

Reviewed and approved by Matt Stohr, Office of Communications and Legislation.

Matt Stohr   8/25/10
Signature   Date

Board	Mtg Date	Item #
EXC	9.16.10	2A

- Worked with the University of Wisconsin–Madison to allow its new human resources system to automatically check for prior Wisconsin Retirement System (WRS) service.
- Initiated planning efforts to offer online appointment scheduling by identifying business needs and reviewing potential off-the-shelf software applications.
- Conducted an internal planning session to outline the highest priority needs and uses of a common demographic database for ETF programs. This is a key step in the development of a consolidated approach for allowing members to update their information in the most user-friendly, efficient and accessible manner possible.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Assigned the new ETF service delivery districts to staff; initiated planning efforts for offering additional "field" presentations in the fall and "piloting" small group sessions around the state in January 2011.
- Solidified plans to hold twice-a-week group sessions in a Waukesha state office building meeting room, ensuring a smooth transition and no service gaps due to the closure of ETF's individual office (in the same building) on October 6, 2010.
- Contacted more than 200 southeast district employers to gauge interest in hosting retirement planning sessions at their locations.
- Implemented planned strategies designed to communicate with WRS members, specifically retirees, about the likelihood of a negative Core Fund annuity adjustment in 2011. This effort included informing retirees via the September edition of *Trust Fund News,* our website, as well as presentations at meetings and conferences of organizations that represent WRS members.
- Added two new online video presentations to the Department's video library. *The Administrative Appeal Process* will help members understand the administrative appeal process as it relates to the Department and the benefits administered by the Department. The second video helps employees who are new to the public sector workforce gain an understanding of their WRS benefits, including disability benefits.
- Initiated a newsletter partnership with the State of Wisconsin Investment Board (SWIB). Both ETF and SWIB will have content in a newly-designed newsletter that will be published three times a year (January, May, and September).
- Implemented a new appointment scheduling structure to better accommodate recent internal staff changes and better support increased outreach and education efforts.
- Published a 16-page brochure on domestic partner benefits. The brochure is designed to help members better understand the workings of domestic partnerships under Chapter 40, the statutes governing the benefits administered by ETF.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Developed and administered a training needs assessment survey to all employees in order to develop an appropriate, job-related training program for fiscal year 2011 and beyond.
- Conducted a *Moving Up, Down, and Around in ETF* training session to provide employees with information on the basics of the hiring process and tips on preparing for interviews. This training session will be offered to employees on a quarterly basis.
- Conducted a *True Colors* training session with the Division of Retirement Services, Member and Employer Services Bureau, Technical Assistance and Account Maintenance Section. *True Colors* is a training program that helps employees understand different personality styles in the workplace.
- Conducted a desktop tools training session on the use of Outlook Calendar 2007 with the Division of Retirement Services, Program Benefit Information Bureau, Retirement Planning Section.
- Conducted a supervisor roundtable discussion on writing effective position descriptions.
- Addressed a variety of current topics with managers during management meetings, including writing performance evaluations, leading change, and using a creative thinking and decision making process called *Six Thinking Hats.*
- Provided to employer-focused staff (both new and veteran employees) the same benefits-oriented training sessions offered to new call center agents.

GOVERNANCE

- Created a Project Management Office to establish and implement project management best practices for the benefit of the Department to encourage collaboration, standardization, and overall improvement in project results across the Department that align to the strategic business plan.
- Implemented a new self-service, team collaboration website known as a *Wiki* for improved communications and transparency with application development projects.
- Enhanced communication between the business areas and information technology (IT) users and the prioritization of IT requests, by implementing a new IT Request system for tracking project requests, application problems, and other requests for IT services.
- Completed an audit of the process that provides retired lives data to the ETF Board consulting actuary in support of the annual WRS valuation. Results showed that the process is free of material errors that may adversely affect the actuarial retired lives actuarial valuation.
- Submitted an application for the federal early retiree reinsurance program, which is designed to encourage sponsors of health insurance programs to maintain coverage for early retirees. The program reimburses plan sponsors (such as ETF) for a portion of health insurance costs for retirees not covered by Medicare.

MISCELLANEOUS

- Completed the Address Project to comply with the United States Postal Service new automation processes for flat size mail. The changes required new address delivery placement and address formatting standards to avoid fines and reduce costs of returned mail.
- Imaged more than 245,000 retirement, disability and other benefit related documents.
- Converted long distance billing services from the Department of Administration to a new carrier. Audited the long distance charges to ensure proper services were billed correctly.
- Coordinated with the Departments of Administration and Transportation on parking logistics for construction of the Park Street/Badger Road intersection project. In addition, completed construction of 16 new parking stalls on the south side of the ETF Badger Road State Office Building to accommodate the loss of parking stalls in the front parking lot.
- Completed planning, construction, installation of system furniture, and technical services and equipment for the new space acquired by ETF at the Department of Revenue State Office Building.
- Conducted a Wisconsin Deferred Compensation (WDC) Program participant survey in July 2010 (distributed online and in print).
- In conjunction with the University of Wisconsin, submitted a grant proposal to the Social Security Administration for a financial literacy project.
- Edited and released the July 2010 edition of the WDC newsletter, *MoneyTalks.*
- Reviewed approximately 60 WDC financial hardship applications.
- Implemented new provisions required by federal health care reform, including eliminating the $2,000,000 lifetime participant plan maximum and the $1,000,000 organ transplant lifetime maximums; and dependent coverage for married children through age 26.
- Implemented new optional employee-pay-all vision and dental coverage through Epic Insurance.