STATE OF WISCONSIN
Department of Employee Trust Funds
David A. Stella
SECRETARY

801 W Badger Road
PO Box 7931
Madison WI 53707-7931

1-877-533-5020 (toll free)
Fax (608) 267-4549
http://etf.wi.gov

EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
September 2011

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from July through September 2011. These accomplishments are linked to the objectives identified in ETF's 2010-2015 strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Updated screens on the Online Network for Employers (ONE) site to detect and correct, at point of entry, address changes made by employers that do not comply with U.S. Postal Service standards.
- Implemented electronic data exchange for Income Continuation and Group Life Insurance applications from the University of Wisconsin System, saving delays and expense associated with filling out, scanning and processing paper forms.
- In support of self-service, completed the Enterprise Information Model (EIM) and associated high-level information flows as input for the Data Governance and Data Privacy Program projects. This model developed the flow of information across and within business processes and is an important first step to determine the agencies interdependencies before implementation of online self services.
- Created a Data Governance Steering Committee to create an institutionalized set of processes, policies, standards, and automation required to measure, manage, and ensure data quality and security.
- Reviewed and selected as standards new information technology tools to increase capabilities for online data presentation.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Made several improvements to the way in which members calling for appointments or information are served. This effort resulted in having a greater number of agents available to answer appointment calls for extended hours of the day; more efficient use of highly-trained personnel; and a reduction in members' time spent waiting "on hold" for an available agent.
- Began utilizing a tracking feature in the new Call and Service System (CalSS), which helped customer service staff improve internal and external communications, service to members and more efficient handling of member concerns and/or problems.

Reviewed and approved by Shawn Smith, Director, Office of Communications and Legislation

Shawn Smith 9/6/11

Signature Date

Board	Mtg Date	Item #
EXC	9.15.11	3A

- Successfully developed, produced and disseminated a number of educational materials for member and employer education to communicate the impact of 2011 Wisconsin Acts 10 and 32. Effort included email updates, newsletters, and videos that reached over 500,000 members.
- Completed 11 training webinars on various Wisconsin Retirement System (WRS) administration topics for WRS employers.
- Completed four full-day regional training sessions for WRS employers.
- Presented WRS administration-related information to WRS employers attending four trade association meetings.
- Conducted 38 group appointments in the Madison office, reaching 115 members and 62 group retirement appointments throughout the state, reaching 510 members.
- Conducted 3 public WRS presentations throughout the state, reaching 400 members.
- Increased the number of individual appointments available by 128 slots.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Conducted staff training on the question-and-answer documents – one each for members and employers – pertaining to 2011 Wisconsin Act 10 and 2011 Wisconsin Act 32 and the Group Insurance Board-approved health insurance changes.
- Trained all customer service staff on the new CallSS system.
- Conducted a training for staff interested in learning more about how to understand the internal project development process.
- Hosted staff training that provided tools and techniques for working with challenging customers.
- Created a new process for staff that improves how urgent member requests are identified and routed internally. The improvement led to efficiencies in processing, internal communications and problem resolution.
- Completed intensive three-week training programming allowing ETF staff to absorb ongoing support responsibilities for myETF Benefits from departing contractor staff.
- Conducted application security training for staff in the Applications Development Bureau to increase expertise and knowledge in security issues and procedures.
- Provided staff with Windows 7 Overview training. All work units were given an overview of what to expect and basics on how to use the new system.
- Completed the distribution of new personal computers (PCs) with Windows 7 software to agency staff. These new PCs with Windows 7 will provide staff with a state of the art computing environment to enhance staff productivity.
- Provided training for internal staff on myETF benefits reconciliation process, allowing for reconciliation of invoices to deductions for annuitants.
- Provided an overview of the state's Social Security administrator responsibilities and critical documentation to new Division of Retirement System staff.

- Established an ETF Training Council to advise in the planning, coordination, and presentation of training for all staff. The members of the Council were selected on the basis of their knowledge, expertise, and current responsibilities in training and development.
- Developed and administered a training needs assessment survey to all employees in order to develop appropriate, job-related training programs for calendar year 2012.
- Conducted a *Reducing Complaints and Appeals and Improving Customer Service* training program to provide participating staff with information about newly developed policies, processes, and methods that have been designed to reduce or resolve customer complaints and appeals. The Department requested and received approval from the Wisconsin Board of Bar Examiners for ETF staff who are members of the Wisconsin Bar to receive Continuing Legal Education Credits for attending this program.
- Conducted a *Working with the Office of Budget and Trust Finance* training program on ETF purchasing practices to continue strengthening internal coordination efforts between business areas of the Department.
- Conducted a *Moving Up, Down, and Around in ETF* training session to provide participants with information on the basics of the hiring process and tips on preparing for interviews.
- Conducted a training session for ETF employees on WRS benefits.
- Conducted *Writers' Workshop* classes to help participants enhance their general and technical writing skills.
- Hosted an *Overcoming Negativity in the Workplace* training program to help participants learn skills and techniques to improve attitudes, reduce complaints and gripes, and build a more positive workplace.
- Hosted a *Time Management Skills* training program to provide participants with tools for setting goals and priorities to improve individual productivity.
- Hosted a *Social Business Virtual Conference: Strategies, Use Cases, and Governance* webinar to educate participants on the uses of social media in working with customers.
- Hosted a *Workplace Ergonomics* program to provide participants with information on proper chair, desk, and other workspace configurations to help prevent aches, pains, and injuries.
- Hosted a *Finding Wisconsin Public Records* training program to educate participants on how to find public records on individuals and businesses such as state and local court records, business entity records, liens, foreclosures, and more.
- Hosted "lunch and learn" sessions on the following topics: living well (Dr. Zorba Paster) and personal credit and finances (Summit Credit Union).
- Upgraded the ETF Computer Training Room with an instructor's work station, LCD projector, and projection screen to enhance the delivery of computer training programs.

- Conducted training sessions on "How to Speak Project," a project management overview training; "How to Successfully Launch a Project," a concept phase training for all ETF employees; and "Project Initiation Phase," a training on how to prepare a detailed project charter that establishes the scope, scale, and success criteria for a project.
- Increased employee satisfaction and retention in the Contact Management section by offering options for flexible scheduling (made possible by changing customer service hours to 7:00 a.m. – 5:00 p.m., Monday through Friday).

MISCELLANEOUS

- Implemented the Roth deferral option for Wisconsin Deferred Compensation Program participants.
- Implemented an interim process to capture and hold selective data received from employers for processing items affected by Act 10/Act 32, like employee terminations and corrections, to previously submitted information. The process will allow staff to review the information prior to it being applied to a member's account, to help ensure that the resulting account updates are appropriate and correct after the necessary system-wide changes have been completed.
- Led the statewide workgroup to review and update the Payroll & Related Records General Schedule to ensure the records retention and destruction for these vital records are appropriate. Submitted to the Public Records Board for final approval.
- Developed project rating criteria and an enterprise project prioritization process as part of the Project Management methodology working with the ETF Project Advisory Workgroup (PAW).