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Department of Employee Trust Funds
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EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
December 2011

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

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Upgraded our Secure File Transfer system used by our Employers, Health Plans and other third-party contractors. This upgraded system provides our customers more flexibility when transferring confidential or private information with ETF.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Created new and revised existing informational materials designed to educate active and retired members about the effects investment markets have on their Wisconsin Retirement System (WRS) benefits. The materials also addressed member questions regarding required contributions and contribution rates in the wake of recent legislative changes.
- Completed the fall 2011 schedule of WRS public presentations in ten cities around the state. Average attendance was 121 attendees this year.
- Conducted outreach group appointments for approximately 400 members in 24 cities statewide.
- Continued working with employers to ensure smooth implementation of provisions of recent legislation. These include: conducting 13 day-long employer training workshops (reaching 424 attendees in 5 cities), 44 webinar training sessions, and new communications explaining changes in employer administration-related processes and procedures.
- Automated a previously manual procedure involving creating and routing "rush" requests for retirement and other benefit applications.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Implemented a free, web-based online registration system for employees to register for ETF training programs.
- Scheduled and published the fall 2011 ETF Training Calendar which offers staff a total of 28 training sessions.

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

Signature Shawn Smith Date 11/18/2011

Board	Meeting Date	Item #
EXC	11.30.11	2A

- Instituted a regular brief e-mail training newsletter with announcements of upcoming training sent to all staff about four times per month.
- Analyzed responses to the 2011 staff training needs assessment survey: response rate was more than 50%; of those who participated, more than 90% completed the survey. The top areas of training needs included: strategic planning, knowledge management, business analysis and business requirements, facilitation skills, Microsoft Office software, coaching, change management, leading teams, and performance standards/evaluation.
- Developed and presented the Team Leaders Overview training program, providing workgroup leaders and lead workers with guidance on leading teams.
- Developed a series of desktop computer skills training to enhance employees' productivity when using Microsoft Office software programs.
- Presented a series of Windows 7 training sessions to orient all Department staff to the new desktop operating system.
- Presented a series of project management training sessions on the ETF project request and project management methodology to staff and managers.
- Completed technical training in "Spring" application development framework tool for ten programmers. This framework will be used for future member/employer self-service tools.

MISCELLANEOUS

- Completed program changes related to Act 10 legislation including allowing for employee required employee paid contributions to be reported and credited to participant accounts on a pre-tax basis and to accommodate the change in contribution rates mid-year. These changes impacted approximately 145 programs and several applications within the Department.
- Implemented functionality in the Benefit Payment System to calculate, produce, and display 1042-S tax statements for non-resident alien annuitants and to electronically transmit this year-end tax reporting data to the Internal Revenue Service.
- In the first 10 months of 2011, finalized almost 11,000 retirement annuities compared to approximately 7,600 during the same period in 2010 resulting in a 30% increase.
- Completed project prioritization process with the Project Advisor Workgroup to ensure that enterprise and business projects align with the Department's Strategic Plan measuring the benefits and risks of each project.
- Established an internal application Design Architecture Review Taskforce to establish programming standards and implement a design and code review process.
- Conducted a review of the Department's internal controls; no significant control deficiencies were identified.
- Conducted an independent review of the accuracy of various estimates calculated by the Department for WRS members. The review verified the accuracy of the estimated calculations and indicated that the Department is doing so in compliance with the statutes.