DEPARTMENT OF EMPLOYEE TRUST FUNDS

Office of the Secretary
Bob Conlin, Secretary
John Voelker, Deputy Secretary
Pam Henning, Assistant Deputy Secretary

- Governance
- Strategic Direction
- Organization Development
- General Oversight

Tarna Hunter, Strategic Engagement & Government Relations Director
- Governmental Relations (State and Federal)
- Legislative Policy Analysis & Tracking
- Advisor to Secretary’s Office and Boards on legislative issues
- Fiscal Estimate Development & Analysis
- Biennial Budget Coordination & Reporting
- Customer engagement strategies and education coordination

Kristin Gunther, Continuity of Operations Plan Manager & Policy Advisor
- Continuity of Operations (COOP) Plan/Pandemic Plan development and oversight
- Enterprise strategic planning coordination
- Team building
- Coaching and facilitation trainings
- Continuous organizational improvements and innovation

Vicki McFall, Project Manager
- Hill Farms Building plan development and oversight
- Project management, business analysis, and process improvement

Staff Services Section
- Appeals Coordination
- Board Liaisons
- Board Elections
- Executive Staff Support
- Paralegal Assistance
- Special Meeting/Event Planning
### DEPARTMENT OF EMPLOYEE TRUST FUNDS

<table>
<thead>
<tr>
<th>OFFICE OF LEGAL SERVICES</th>
<th>OFFICE OF POLICY, PRIVACY &amp; COMPLIANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Nispel, General Counsel</td>
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<tr>
<td>(6.0 FTE, 6 Employees)</td>
<td>Steve Hurley, Director</td>
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<tr>
<td>(4.0 FTE, 4 Employees)</td>
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- Legal services for Secretary's Office, ETF staff, and the boards
- Provide legal opinions and analysis
- Respond to legal inquiries from courts, participants, attorneys, legislators, and others
- Respond to public records requests and subpoenas
- Represent ETF in administrative appeals and appeals of duty disability application denials
- Draft legislation and administrative rules
- Monitor and analyze state and federal legislation and work with Legislative Liaison on issues affecting ETF and WRS participants
- Assist Director of Communications in responding to inquiries from media, WRS participants, legislators, and others
- Respond to Notice of Claims filed by citizens against the State
- Ombudsperson services staff serve as a resource and provide assistance to members in an effort to resolve issues that involve WRS benefit programs and reduce the number of appeals
- Policy review and development
- Analysis of proposed legislation and policy
- Federal and State regulation & compliance
- HIPAA Compliance
- Internal revenue code compliance
- Privacy policy & training
- Agency Incident Commander (COOP)
## DEPARTMENT OF EMPLOYEE TRUST FUNDS

### OFFICE OF INTERNAL AUDIT
Yikchau Sze, Director  
(4.0 FTE, 4 Employees)

- Staff to Audit Committee of ETF Board
- Prepare and carryout biennial audit plan (financial, operational, compliance, and investigative audits)
- Coordinate responsibilities with external auditors engaged by ETF
- Review internal controls of ETF & make recommendations to Secretary’s Office on risk areas

### OFFICE OF ENTERPRISE INITIATIVES
Michelle Baxter, Director  
(12.80 FTE, 13 Employees)

- Transformation, Integration, and Modernization (TIM)
- Portfolio and Project Management
- Business Analysis (Standards and Templates)
- Data Integrity and Governance
- Benefit Administration System (BAS)
- BAS Technical Infrastructure
- BAS Security

### OFFICE OF COMMUNICATIONS
Mark Lamkins, Director  
(4.0 FTE, 4 Employees)

- Overall Department communication
- Brand guide for internal and external communication
- Forms management
- Video library/social media
- External public communications
- Webmaster administration
- Strategic planning coordination

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(Updated 4/30/2018)
DEPARTMENT OF EMPLOYEE TRUST FUNDS
OFFICE OF STRATEGIC HEALTH POLICY

Eileen Mallow, Director
Vacant, Deputy Director
(15.0 FTE, 15 Employees)

- Primary staff to Group Insurance Board
- Staff to ETF Board (for ASLCC)
- It's Your Choice content

HEALTH BENEFITS & INSURANCE PLAN
- Health Insurance (Standard Plans, Retiree Plans, Coinsurance Plans)
- Life Insurance (State and Local, Spouse and Dependent)
- Long-Term Care Insurance
- Accumulated Sick Leave Program (ASLCC)
- Flexible Spending Accounts (medical, dependent day care, parking, and transit)
- Contract administration for above programs
- Departmental Determinations

POLICY & STRATEGIC PLANNING
- Data Analytics
- Federal Health Policy
- Disease Management
- Wellness
DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF TRUST FINANCE

Cindy Klimke-Armatsosi
DIVISION ADMINISTRATOR/CHIEF TRUST FINANCE OFFICER
(24.0 FTE, 24 Employees)

- Process all financial transactions for benefit plans including contributions, benefit payments, and third party administrator invoices
- Maintain WRS member accounts
- Generate the Comprehensive Annual Financial Report

FINANCIAL COMPLIANCE BUREAU
David Ehlinger
Bureau Director

- Financial reporting
- Actuarial reporting and analysis
- Maintain Market Recognition Account
- Calculate effective rate
- Calculate annuity adjustments
- Calculate contribution rates
- Calculate fees
- Tax reporting
- Process cash receipts and disbursements for non-WRS programs
- Internal control plan maintenance

RETIREMENT ACCOUNTING BUREAU
Michelle Mattox
Bureau Director

- Collect WRS contributions
- Maintain WRS member accounts
- Process annuitant and lump sum payroll
- Manage accounts receivable and collections
- Manage employer accounts
- Generate Statement of Benefits
DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF MANAGEMENT SERVICES (continued)

BUREAU OF INFORMATION TECHNOLOGY SERVICES
Steve Mueller
Bureau Director/Chief Information Officer
Mark Robinson
Deputy Bureau Director

- IT strategy
- IT plan implementation
- IT talent management & resource allocation
- IT capacity management
- IT project/initiative prioritization methodology
- IT architecture

APPLICATIONS DEVELOPMENT SECTION
- Computer applications development and support
- BAS Co-Development & Bridging/Interfacing
- Feasibility studies and design analysis
- Technical design architecture standards
- Production and operational support services
- Life cycle analyses for software packages and custom-developed systems
- Software development process (i.e. SDLC)
- Document imaging projects & workflow design
- Technical architectural support (for imaging and workflow, web, telephony, data systems)

QUALITY MANAGEMENT SECTION
- Existing systems maintenance
- Quality assurance including testing
- Re-engineering projects, support, and solutions
- Change control (project requests)
- Life cycle analyses for software packages and custom-developed systems
- Software development process (i.e. SDLC)
- Product evaluation

IT SOLUTIONS CENTER
- IT property asset management
- System administration
- "Help Desk" support for all department applications
- Production support (data control, data entry, and job control services)
- Brokering/liaison for DET services
- IT hardware and software procurement
- Telecommunications
- User security and access management
- LAN, WAN, and infrastructure support and installation

DATA ADMINISTRATION & SUPPORT SECTION
- Database management
- Data administration and consultation
- Database design
- Data/information architecture

(Updated 4/30/2018)
DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF MANAGEMENT SERVICES (continued)

BUREAU OF INFORMATION SECURITY MANAGEMENT
J. Trae Matte
Bureau Director/Chief Information Security Officer

- Information security strategy
- Security administration, consultation, and policy development
- Information security system administration
- Information security training
- Information security project/initiative oversight
- Security incident response planning
- IT disaster recovery and business continuity planning
DEFERRED COMPENSATION
Shelly Schueller, Director
- Primary staff to Wisconsin Deferred Compensation (WDC) Board
- Contract oversight of WDC program
- WDC plan and trust oversight
- Edit WDC website and newsletter
- Respond to WDC determinations and appeals

POLICY AND SYSTEM IMPLEMENTATION
- Administrative rule coordination with OPPC and OLS
- Analyze proposed legislation
- Assistance with Board support & reporting
- Program/Operations policy review
- Business analysis for projects
- System data integrity
- System/Program/Procedure training

MEMBER SERVICES BUREAU
(SEE NEXT PAGE)

BENEFIT SERVICES BUREAU
(SEE PAGE 12)

EMPLOYER & CONTACT SERVICES BUREAU
(SEE PAGE 13)
DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF RETIREMENT SERVICES (continued)

MEMBER SERVICES
BUREAU
Roger Fletcher
Bureau Director

- One-on-one member meetings
- Conducting group retirement sessions
- Detailed explanation of WRS benefits
- Provision of account-specific information
- Calculation of complex benefit estimates
  (retirement, disability, death, service purchase)
- Assistance with benefit application process
- Responses to calls, letters, and e-mail inquiries
- DRS staff training development and delivery

RETIREMENT PLANNING & OUTREACH SECTION 1

- DRS staff training development and delivery
- Oversight of virtual appointments

RETIREMENT PLANNING & OUTREACH SECTION 2

- Maintain content of forms and brochures
- Process daily mail from members
- Coordinate SWAT activities
- Death review- Use Berwyn to ID death of inactive & lost contact members

RETIREMENT PLANNING & OUTREACH SECTION 3

- WEBS system maintenance, daily reconciliation and custom file maintenance
- Abandoned accounts
- Visitor check-in
- Quick service

RETIREMENT PLANNING & OUTREACH SECTION 4

- Group retirement sessions
- Public & private outreach presentations
- Oversight of Benefit fairs
- MSB Reporting & Statistical Analysis
DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF RETIREMENT SERVICES (continued)

BENEFIT SERVICES
BUREAU
Jim Guidry
Bureau Director

BENEFIT INITIATION
SECTION
- Final retirement calculations & annuity corrections
- Disability retirement calculations
- Non-annuitant death benefit annuities
- Special active death lump sum benefit computations
- Retirement, death, separation eligibility determinations
- Initiating annuities on payroll
- Lump sum retirement, death, separation benefit computations
- Required distributions
- Certify life insurance coverage for retirees

DISABILITY PROGRAMS
SECTION
- Benefit administration for disability programs
- §40.63 Disability Retirement Program
- §40.65 Duty Disability Program
- Case management
- Coordination of benefits

DISABILITY POLICY
ANALYSTS & BUREAU SMEs
- Primary staff to Group Insurance Board (for ICI and LTDI programs)
- Primary staff to Teachers Retirement, Wisconsin Retirement and Employee Trust Funds Boards (for §40.63 and §40.65 disability programs)
- Income Continuation Insurance (ICI) (short and long term)
- Long-Term Disability Insurance (LTDI)
- Policy Review and Development
- Contract administration
- Departmental determinations
- Problem identification and resolution
- Training
- Special projects