



STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

Wisconsin Department
of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
1-877-533-5020 (toll free)
Fax 608-267-4549
etf.wi.gov

Correspondence Memorandum

Date: November 16, 2020
To: Employee Trust Funds Board
From: John Voelker
Deputy Secretary
Subject: Organizational Metrics (ETF Scorecard)

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

When I introduced the metrics report to the Board in March 2018, it was intended to enhance the board's ability to monitor agency operational performance and strengthen overall board governance. Over the last two years, we have made progress in both areas. The new ETF Scorecard, which is attached, builds on that progress and strengthens board governance by expanding upon operational metrics. The new measures will now allow the Board to better monitor progress toward achieving strategic goals and ensure organizational performance continually improves.

Each measurement is associated with one of the agency's strategic goals and includes a North Star target, a current year performance target, a current reporting period score, and a previous reporting period score. I described each measurement in my organizational metrics memo ([Ref. ETF | 9.17.20 | 5B](#)) that was included in the September board meeting materials. The scorecard is still a work in progress. In identifying our performance measures, we focused on the best indicators of success rather than on the data that was easily available.

As a result, the report includes entries such as N/A and TBD. This is primarily because data is not yet available for the measure, or the infrastructure doesn't yet support the ability to measure it. In measures where this occurs, there is an additional entry that shows the percent of implementation tasks completed during the quarter. This is intended to keep us on track in completing the work necessary to report on the measure in the future.

A good example of this is the first measure under the goal of creating an effortless customer experience. This specific measure is a combination of the customer satisfaction score, the easy score, and the net promoter score. Currently, our member surveys don't capture all the data needed to calculate these scores, so this measure is

Board	Mtg Date	Item #
ETF	12.10.20	5B
BUD	12.09.20	5

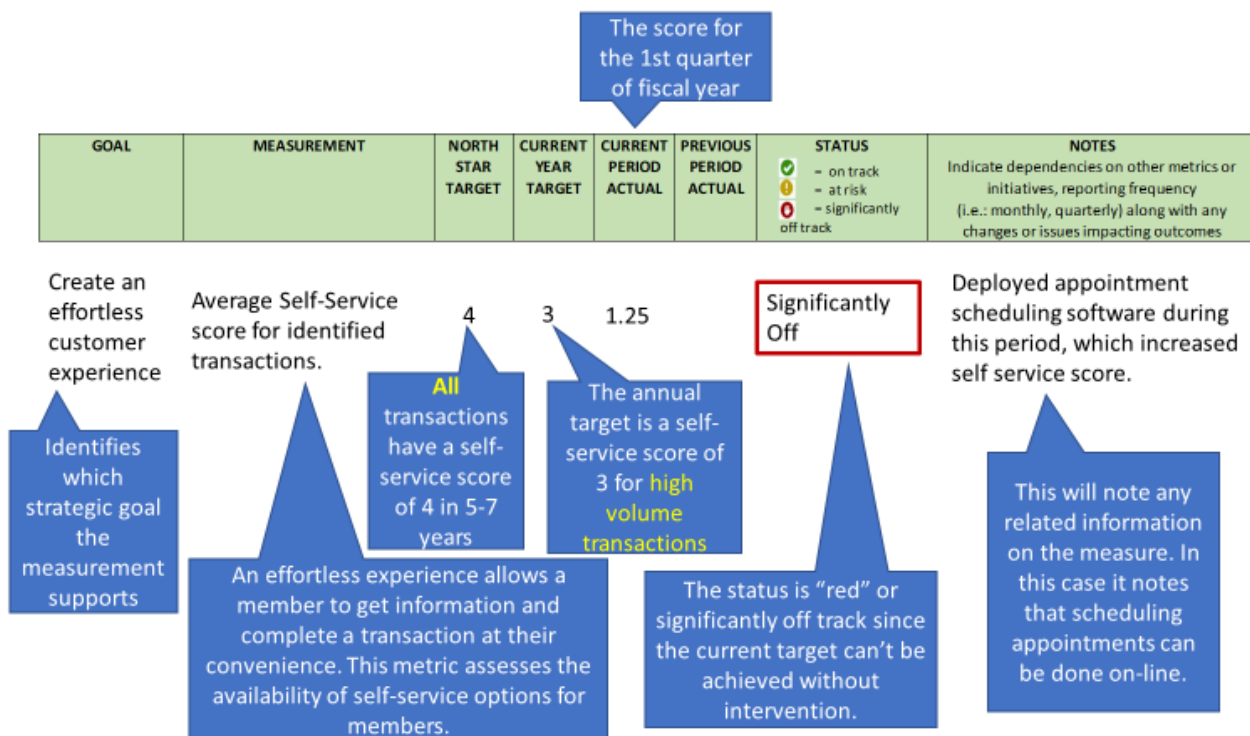
noted as N/A. However, we have launched a project to collect this information, which is represented in the second measure under that goal. As stated in the notes, we anticipate having data at the end of the next quarter.

In general, we are making progress in meeting our current year targets. As you might expect at this point, there is more work to be done in accomplishing our North Star targets. However, this scorecard should provide the board an objective way to measure progress towards those long-range goals and ultimately to accomplish the stated strategic goals.

Since this is the first time you have received the ETF Scorecard, this memo will break down a couple of measures to demonstrate how to interpret the data. To that end, the following diagrams dissect two measures related to the effortless customer experience goal. The first example is a measure in which we are not meeting the current year target, and the second example is a measure in which we are meeting the current year target.

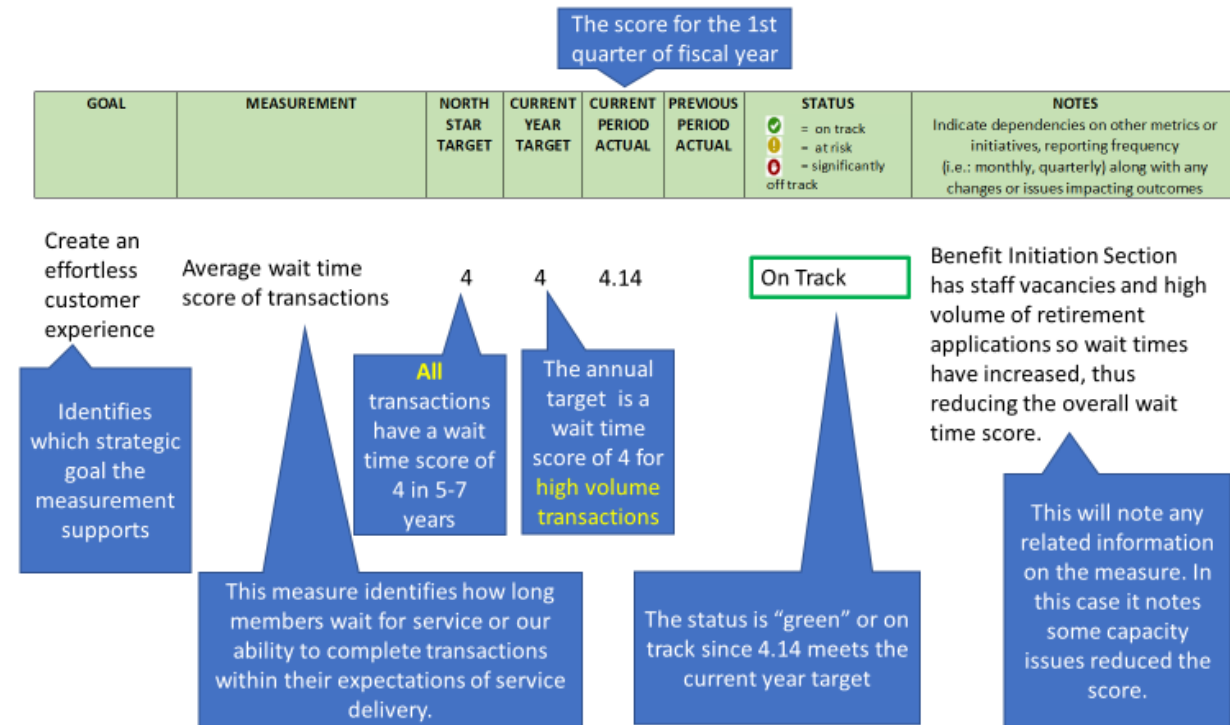
Average Self-Service Score

CEM regularly reports that our lack of on-line services contributes to a lower overall service score. In addition, members frequently inquire about completing transactions on-line. This measure identifies the level of on-line service available to our members. As you can see, despite making progress by implementing the on-line appointment scheduling system, this is an area that needs improvement both in the short term and long term.



Average Wait Time Scores

How long members wait for service contributes to their customer experience. This measure identifies if we are meeting expectations for service delivery and timeliness. While a high volume of applications coupled with some staff vacancies affected the wait time score, we achieved the current year target for high, volume transactions.



As always, I will be available at the meeting to answer questions.

Otherwise you can contact me at 608-266-9854 (email john.voelker@etf.wi.gov) with questions or comments.

Attachment: ETF Scorecard



ETF Scorecard

For Period Ending: 09/30/2020

MEASUREMENT	NORTH STAR TARGET	CURRENT YEAR TARGET	CURRENT PERIOD ACTUAL	PREVIOUS PERIOD ACTUAL	STATUS	NOTES Indicate dependencies on other metrics or initiatives, reporting frequency (i.e.: monthly, quarterly) along with any changes or issues impacting outcomes
GOAL 1: Create an effortless customer experience.						
Percent of members who indicate high satisfaction, low effort, and high willingness to recommend ETF services through customer service surveys	TBD	TBD	N/A	N/A		Data will not be available until related project work has been completed.
Percent of implementation plan tasks scheduled to be completed in the quarter that are completed by quarter end	100%	100%	N/A	N/A		Project launched in FY 21 Quarter 2. Data will begin end of next quarter.
Average Wait Time Service Level Agreement score for identified transactions	4 for all trxn	4 for High Value/High Impact trxn	4.14	N/A	✓	Benefit Initiation Section has staff vacancies and high volume of retirement applications so wait times have increased, thus reducing the overall wait time score since the first trial data pull in August.
Average Self-Service score for identified transactions	4 for all trxn	3 for High Value/High Impact trxn	1.25	N/A	✘	Deployed appointment scheduling software during this period, which increased the self service score.
GOAL 2: Implement outcomes-driven performance management and process management.						
Percent of Level 1 processes that are performing at expected service levels	90%	5%	0.00%	N/A	⚠	Process measures are under development and have not yet been implemented.
Percent of Level 1 processes that are documented, with appropriate performance measures and controls in place	99%	20%	30.73%	N/A	✓	As of 7/31/2020, 30.73% of level 1 processes have portions of the documentation completed.
Number of process improvement initiatives that result in improvement in at least one of the performance criteria	50	20	15	N/A	✓	15 process improvements have been completed and recorded meeting at least one of the performance criteria during this reporting period.
GOAL 3: Build a talented and agile workforce.						
Percent of FTE new hires meeting proficiency requirements during the first 12 months of ETF employment	TBD	TBD	N/A	N/A		Data will not be available until related project work has been completed.
Percent of permanent FTE workforce meeting proficiency requirements, reported quarterly	TBD	TBD	N/A	N/A		Data will not be available until related project work has been completed.
Percent of talent development program tasks completed on schedule	100%	15%	3%	N/A	✓	This reporting period progress represents 3% of the overall project effort complete.
Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter are completed on schedule	100%	100%	N/A	N/A		Work plan being finalized. Will reflect progress in next quarter.
GOAL 4: Implement modern, secure, and resilient information technologies.						
Percent of applications in the Invest quadrant of the Gartner TIME model	50%	16%	9.00%	N/A	✓	This is the first update to the Application Portfolio Management score since the first trial data pull in August.
Percent of data meeting our data quality target score	97%	87%	84.08%	N/A	✓	Data stewards spent the majority of the quarter focusing on the Master Data Management proof of concept. This score may fluctuate for the first 6-12 months as data stewards are getting up to speed and refining business rules.
Percent of Key Risk Indicators that are within established risk thresholds	8 of 9	6 of 9	6 of 9	N/A	✓	Due to an external dependency one data collection metric is outstanding.

- Legend:**
- ✓ **On track** - Work accomplished meets or exceeds this period's expectations and represents progress at a pace that will achieve the expected year-end results.
 - ⚠ **At risk** - Expected results for this period have not been met. Performance gaps are not significant enough to impact the expected year-end results.
 - ✘ **Significantly off track** - Expected results for this period have not been met. Year-end results will not be achieved without intervention.