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Correspondence Memorandum

Date: December 9, 2021
To: Employee Trust Funds Board
From: Pam Henning
Assistant Deputy Secretary
Subject: ETF Organizational North Star Metrics

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

Attached is the Department of Employee Trust Funds scorecard for the period ending September 30, 2021. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represents the first reporting period for the FY22 ETF Scorecard. Of the 8 measurements for which we have available data, all are on track to meet annual targets.

The FY22 Scorecard continues to focus on key modernization efforts, which include technology, process and workforce capabilities to ensure their success. While the FY22 Goals remain unchanged from FY21, several new measurements have been added to the ETF Scorecard to capture new system implementations and provide greater performance visibility across the organization, including:

Goal 1: Create an effortless customer experience

- Customer experience roadmap milestones met: recognizing the work to be done to understand both current and desired future state of the customer experience, this measure will track our progress on the activities required to accomplish that.

Goal 2: Implement outcomes-driven performance management and process management

- Percent of Enterprise Content Management (ECM) and Insurance Administration System (IAS) processes documented: this refines last year's measure, with an intentional focus on those processes related to the ECM and IAS modernization efforts.




As noted in the FY22 Q1 Scorecard, measurement data for these new measurements will begin reporting in the FY22 Q2 cycle.

I will be available at the meeting to answer any questions.




Attachment: ETF Scorecard

Board	Mtg Date	Item #
ETF	12.09.21	5B
BUD	12.09.21	6




ETF Scorecard FY2022 Q1 (July 1 - September 30, 2021)

GOAL	MEASUREMENT	NORTH STAR TARGET	CURRENT FISCAL YEAR TARGET	CURRENT PERIOD ACTUAL	PREVIOUS PERIOD ACTUAL	STATUS  = On Target  = At Risk  = Significantly off Track	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	91.40%	86.40%	N/A	N/A	N/A	Data will not be available until related project work is completed in Q2.
	Average Wait Time SLA score of identified transactions	4 for all trxn	4 for HVHI trxn	4.6	N/A	On Target	The wait time score (ease of doing business score) for this quarter was better for ETF customers when compared to the last quarter, largely due to less customer demand this quarter compared to last quarter. Note: ETF's Strategic Council removed the online access portion of the Ease of Doing Business Score as increased online access is dependent upon the Insurance and Pension Administration Systems.
	Percent of Enterprise Survey and Data Management project implementation plan tasks scheduled to be completed in the quarter that are completed by quarter end	100%	100%	82%	N/A	On Target	Phase 1 (survey software) progress was reported in the previous period, and has since been completed. The FY22 Q1 current period actual reporting reflects Phase 2 (survey process) progress, which is 82%.
	Customer experience roadmap milestones met	N/A	N/A	N/A	N/A	N/A	Data not available until Q2.

ETF Scorecard FY2022 Q1 (July 1 - September 30, 2021)




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Goal 2: Implement outcomes-driven performance management and process management.	Cumulative number of process improvement initiatives that directly contribute to at least 1 strategic goal or objective	40	35	10	N/A	On Target	10 process improvements have been completed and recorded meeting at least one of the performance criteria during the period of 7/1/2021 and 9/30/2021
	Percent of ECM and IAS processes documented within Promapp (ETF's business process management software), with appropriate performance measures and controls in place	100%	25%	N/A	N/A	N/A	Data not available until Q2.
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	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	N/A	Data will not be available until related project work has been completed.
	Percent of competency program tasks completed on schedule	100%	64%	46%	N/A	On Target	46% of the overall project effort is complete. The % complete is based on items outlined in the workplan. Items completed include: 1.) Five leadership competencies were selected and approved 2.) Updated performance evaluation forms reflecting new competencies 3.) 15 job functional families and approach for job functional competencies were approved 4.) A small group of ETF staff began testing the system.
	Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule.	100%	100%	34 of 34	N/A	On Target	Items completed include: 1. researching a mentoring program; and 2. developing Psychological Safety online training for staff.

ETF Scorecard FY2022 Q1 (July 1 - September 30, 2021)

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Goal 4: Implement modern, secure, and resilient information technologies.	Percent of applications in the Invest quadrant of the Gartner TIME model *	50%	20%	17%	N/A	On Target	During this reporting period, there were no systems added and no systems retired. Data gathered this quarter included a scoring change on one system, but not enough to change the overall portfolio health. The portfolio remains 17% modernized.
	Percent of data meeting the data quality target score	97%	90%	87.30%	N/A	On Target	The MDM software is ready for ECM go-live after the stewards prioritized fixing issues which would have caused errors in the ECM. The person domain steward and subject matter experts resolved more than 2,100 suggested person entity matches from the MDM. The person domain steward started transitioning from using current data quality reports to leveraging the MDM to monitor quality in the demographics and contact information sub-domains. The stewards have revised stretch goals for the upcoming year. Recently, data stewards were assigned to the Financial and WRS account domains and have started reviewing and prioritizing data quality rules.
	Percent of Key Risk Indicators that are within established risk thresholds	8 of 9	6 of 9	4 of 9	N/A	On Target	The Q1 scoring components breakdown includes: 1. Vulnerabilities score: staff turnover and conflicting priorities impacted achieving the goal metric. 2. Response score: A root cause assessment is planned to address achieving response expectations within our given reponse time. 3. Phishing: This score reflects only those units tested, not all of ETF. This score will improve as we deploy testing and reporting these with the business units.

* The Gartner T.I.M.E model (Tolerate, Invest, Migrate, Eliminate) is the tool used to evaluate and make decisions about ETF's application portfolio (the collection of IT systems used). Applications are evaluated for their ability to produce value at a reasonable cost, to eliminate low-value systems and increase investment in high-value systems. The higher the % of portfolio within the "Invest" quadrant (N. Star metric) indicates greater overall portfolio value meeting ETF's member and employer needs.

Legend

-  **On target** - 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.