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Correspondence Memorandum

Date: September 6, 2022

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 June 30, 2022. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represent the final reporting period for the FY22 ETF Scorecard. Of the 11 measurements for which we have available data, eight are on track with six meeting or exceeding their current fiscal year targets, and three are significantly off-track. Some notable developments during this reporting period include:

Goal 1: Create an effortless customer experience: This quarter the following measurement changed status:

- **Percent of Group Insurance Board (GIB)-approved projects on schedule**: Although this measurement was added to the ETF Scorecard last quarter, it was necessary to put this initiative "on hold" due to an urgent shift in staff priorities. The unexpected departure of a large health insurance vendor from the healthcare market required key staff to focus on finding a replacement to continue coverage for 52,000 members. While this initiative is on-hold, the status will remain significantly off-track. Active status is expected to resume following the 2022 Open Enrollment period.

Goal 3: Build a talented and agile workforce: The following measurement was completed this quarter:

- **Percent of Equity and Inclusion tasks scheduled to be completed within the quarter that are completed on time**: The FY22 Equity and Inclusion Plan Year 2 initiative was completed with accomplishments addressing the three focus areas of recruitment, retention and culture including:
  - Recruitment:
    - Hosted a pilot seminar with the UW Madison LaFollette School of Public Affairs

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- o Retention
    - Provided Supervisor Stay Interview training
    - Established Peer Learning Groups for supervisors
    - Developed a communication plan and deliverable related to professional development opportunities available for ETF Staff

- o Culture
    - Implemented Respectful Workplace Training for all staff
    - Researched and created an implementation plan for a mentoring program at ETF
    - Surveyed ETF staff for interest in Staff Network Groups to foster community through shared interests

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

ETF Scorecard FY2022 Q4 (April 1 -June 30, 2022)

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.	Customer Experience Feedback Score - percent of members who indicate high satisfaction, low effort, and high willingness to recommend ETF services through customer service surveys	91.40%	86.40%	87%	89%	On Target	The Customer Experience Score decreased slightly from last quarter due to lower Net Promoter (NPS) and Net Satisfaction (NSAT) scores. The NPS score is provided by the retirement appointments survey. There were no clear trends to indicate why the score was lower this quarter.The NSAT score is provided by the Call Center and Website surveys. The Call Center score remained steady while the website score decreased. The majority of low score comments were due to frustration that we do not offer an online system.

	Average Wait Time Service Level Agreement Score of identified transactions	4 for all trxns	4 for HVHI trxns	3.71	3.71	On Target	The wait time score for this quarter is the same as last quarter. The two most notable areas challenging ETF's ability to meet the standard wait times are: 1) the average speed for answering member phone calls and 2) the time it takes for a member to meet with a benefit specialist for a retirement appointment. Increased wait time can be attributed to: • Additional calls from retirees in response to the new requirement for ETF to make federal tax changes in 2022 • Seasonal increase in demand typical in the first half of each year (taxes, statements, etc.) • Staff vacancies coupled with decreased staffing for providing appointments (compared to previous years).
	Customer experience roadmap milestones met	100%	100%	80%	100%	On Target	This quarter the percent of tasks completed decreased to 80% of the expected 100% complete primarily due to a delay on a key milestone. An approved plan is now in place to get the project back on track. Items completed during this reporting period include: • Current state documentation • Future state documentation • Gaps between current and future State documentation • Improvement ideas documentation • Proposals for fostering customer-centric culture, focusing on employee experience to drive customer experience, strengthening the voice of the customer • Customer experience case study exercise

	Percent of Group Insurance Board-approved projects on schedule	100%	60%	32%	100%		Significantly Off Track	Completed 32% of the expected 44% project tasks with this measurement changing to "on-hold" status in early June, due to the need for key staff to focus on replacing a large health insurance vendor to continue coverage for 52,000 members. This measurement is expected to resume active status and continue reporting for the FY23 Scorecard following the annual Open Enrollment period.
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	22	15		Significantly Off Track	This measurement remains significantly off track due to limited resources and competing priorities. As a result, the current fiscal year target was not achievable. Additional training of seven staff is currently underway and will support future process improvements. Seven process improvements were completed this quarter, including: • A dashboard to visualize and quickly report data related to N. Star metrics for tracking turn-around time to complete WRS benefit estimates, allowing resources to focus on high-value work. • An employer training webinar on what to expect once their resolution is submitted to ETF. This includes an introduction to the ETF website, onboarding checklist and timeline. • On-demand video presentations for members on topics no longer presented in-person (Divorce, Return to Work, and Sick Leave mailers)

	Number of ECM and IAS processes documented within Promapp (ETF's business process management software), with appropriate performance measures and controls in place	100	30	25	14	Significantly Off Track	This measurement remains significantly off track due to limited resources, competing priorities and delays within the insurance administration system (IAS) implementation project. As a result, the current fiscal year target was not achievable. Due to the delay in the IAS project, the timeline for documenting future state has been extended through 2024. This quarter eleven processes were documented including: ECM functional requirements: • case management • indexing documents • process steps IAS Future State: • Adding an HR Admin • Support Okta user / MyWisconsin ID account IAS Current State: • COBRA ERA/FSA Continuation • COBRA Health Insurance Continuation • Health Insurance Billing • Insurance annuity deductions and payment
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.

Goal	Measure					Status	Notes
	Percent of competency program tasks completed on schedule	100%	64%	66%	56%	On Target	66% of the overall project effort is complete (10% gain since prior reporting period). A high-level summary of items completed this reporting period include: • The new shared welcome page in LaDR for both learning and performance successfully launched in June • Seven of 15 job families have selected functional competencies • A series of drop-in open labs focused on performance system navigation were offered to staff • The Meeting in a Box tool has been utilized by multiple business areas to help socialize the competencies
	Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule.	100%	100%	100%	100%	On Target	The Equity & Inclusion Plan Year 2 tasks are completed and this phase of the project is closed. The 100% completion is based on the following 4 tasks: • Reviewed the stay interview feedback received from the pilot group members. • Reviewed resource material for a mentoring program at ETF, created the program implementation plan, established the program approval process and selected the senior level champion. • Created the communication plan and deliverable related to the professional development opportunites available for ETF Staff. • Surveyed staff about staff network groups (SNG).
Goal 4: Implement modern, secure, and resilient information technologies.	Percent of applications in the Invest quadrant of the Gartner TIME model **	50%	20%	26%	24%	On Target	During this reporting period, the WebForms Application was added and no systems were retired. Data gathered this quarter indicates our portfolio is now 26% modernized, exceeding our FY22 target by 6%.

		Percent of data meeting the data quality target score	97%	90%	91.09%	90.99%	On Target	The overall quality score increased by 0.10% over the previous quarter. The data stewards continue to focus on the insurance administration system project, helping to identify data fields which are editable by insurance subscribers. The stewards have focused data cleansing efforts on insurance eligibility and enrollment and have also started planning the future data quality framework to include modernization systems.
		Percent of Key Risk Indicators that are within established risk thresholds	8 of 9	6 of 9	9 of 9	6 of 9	On Target	At the start of last quarter, the cyber security team was finally fully staffed and total vulnerability numbers were at an all-time low. The following tasks were accomplished through the success of cross-functional teams: • met expectations for delivering security reviews • tested agency responses • provided training to the agency on cyber security threats.

** 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.