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Department of Employee Trust Funds
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EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
April-June, 2010

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from April through June 2010. These accomplishments are linked to the objectives identified in ETF's 2010-2015 strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Issued a Request for Bid to procure consulting services to evaluate the Wisconsin Retirement System (WRS) Business Risk Readiness Assessment to meet the objectives of our five-year strategic business plan. The assessment will provide a roadmap to migrate and mitigate risk as we implement our plan.
- Submitted a project request for creation of an online tax calculator that retirees, potential retirees, and staff can use to translate withholding based on marital status and exceptions to a dollar amount.
- Prepared a survey asking WRS members about the type of on-line transactions they would prefer to conduct with the Department. The surveys were distributed (and collected) at various stakeholder group conferences, such as the Wisconsin Coalition of Annuitants annual conference. The survey results will help the Department plan and implement on-line services.
- Conducted a live webcast of a WRS presentation on the Department's Internet site.
- Completed the myETF Benefits Member Health Insurance Inquiry and Administrator portion of the Health Insurance Electronic Enrollment, Payment and Validation Project (EVP) and encouraged internal staff to access and view their own personal health information. In addition, initiated an arrangement with the City of Madison to test the new system, with the ultimate goal of providing access to other members/employers within the next few months.
- Completed the processes of assigning an ETF member identification number (ID) to all active members and notifying them via the 2010 *Statement of Benefits*.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Provided extended hours in the Contact Management Section from April 12 through June 1 in response to high call volume and related service demands.

Reviewed and approved by Matt Stohr, Office of Legislative Affairs, Communications and Quality Assurance.

Signature Date

Board	Mtg Date	Item #
EXC	6.24.10	3A

- Developed a new disability form that provides user-friendly content and information about the 40.63 disability program. The new design of the form allows the Department to include other disability related forms in the same folder. Therefore, all of the necessary disability forms will be in one place for members.
- Developed a supplemental funding request for the Department and submitted the request to the Legislature's Joint Committee on Finance for review and consideration. Among other things, the request seeks additional resources to expand outreach to members and employers.
- Implemented the Lump Sum Payment System and in the first seven weeks of use, the Department paid 1,413 payments totaling $19.4 million.
- Continued updating the Benefit Payments System (BPS) with variable account information for approximately 34,000 members. Once completed, the system can automatically provide information to retirees interested in converting the variable portion of their annuities to the Core Trust Fund.
- Implemented a revised Benefit Inquiry process through workflow. This new process enhances customer service by moving requests more quickly through the various areas involved and providing a better tracking method.
- Continued to communicate with WRS retirees about 2010 Core Fund and Variable Fund annuity adjustments. We wrote about the annuity adjustments in the May edition of Trust Fund News. We also responded to numerous calls, e-mails and letters from retirees who had questions about this year's negative Core Fund rate.
- Developed a document to explain the difference between the Variable Fund effective rate and Variable Fund annuity adjustment rate to WRS retirees who participate in the Variable Fund.
- Implemented changes to the annual life insurance census process, which resulted in more accurate coverage updates and reduced workload for payroll processing centers and state agency payroll staff.
- Implemented a Group Insurance Board-approved life insurance accidental death exclusion for pilots/passengers in private planes.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Identified skills required for the successful implementation of the Information Technology (IT) Governance and Project Portfolio Management (PPM) project. This inventory will lead to a comprehensive training program.
- Conducted computer security training with the Java programmers covering application vulnerabilities and the programming techniques for preventing them.
- Conducted staff training on proper United States Postal Service address formats, ensuring both greater compliance with mailing standards and lowering postage costs due to mailing errors.

GOVERNANCE

- Developed a new IT governance and PPM system. The standardized project management governance and structure provides a framework for consistently evaluating, prioritizing, documenting, reporting and improving projects. The PPM process will reduce business risk, optimize resources and contribute to better alignment and realization of IT projects with the strategic business plan.
- Implemented applications to use the National Change of Address (NCOA) database to ensure the Department uses complete and accurate addresses for member correspondence and payments.
- Merged the Change Control Board functions for oversight of the Benefit Payment System (BPS) and Lump Sum Payment Systems (LSPS) to ensure a comprehensive assessment of targeting the best use of resources to continually improve these mission-critical applications.
- Evaluated Request for Qualification proposals, the first step in securing a site and space for a long-term building for ETF.
- Acquired 14,785 square feet of space at the Department of Revenue to relocate 90 ETF staff from the Ann Street and the Badger Road State Office Building locations in the fall.
- Completed Request for Proposals for the Wisconsin Public Employers Group Life Insurance program and the Pharmacy Benefit Manager for the State and Wisconsin Public Employers Group Health pharmacy benefit plans.
- Updated and distributed the Records Management Program Manual to all supervisors and staff ensuring compliance with statutory and state records policies and procedures and defining ETF records for retention and destruction.
- Prepared and released a request for proposal for the Group Life Insurance Program.

MISCELLANEOUS

- Developed a Supply & Mail Services Standard Mailing Policy to conform to new United States Postal Service (USPS) regulations and policies, to improve delivery of mailings and to safeguard members' personal information.
- Improved capabilities of ETF's application development team by updating the Java code repository, the server hardware and software used to store and manage ETF's application code.
- Procured and implemented a new, more sophisticated IT request tracking system. This system is used by ETF's business areas and IT to track requests for new projects and computer application enhancements and defects.
- Created an Application Development Technical Architecture Review process. A team of ETF's senior technicians will review new technologies and propose application designs to evaluate conformity with state and Department standards and best practices.

- Imaged 276,302 retirement, disability and other benefit related documents for access by staff to complete applications and answer questions for WRS members.
- Implemented a new Storage Area Network to provide ETF with increased storage for existing and new systems and for expansion into the next five years.
- Purchased a new virtualization infrastructure to provide ETF with a cost effective, efficient infrastructure for deploying and consolidating IT server systems. This new system will allow ETF to consolidate approximately 50 existing servers and new servers systems onto three servers running virtualization software. This will reduce ETF long-term server costs and provide an environment for more rapid deployment of servers.
- Determined benefit coverage and taxation issues relating to health insurance coverage mandates.
- Finalized a third party administrator compliance audit contract and initiated audits for the group life and ERA/Commuter Benefits programs.