

# ETF's Strategic Plan Annual Review And Going Forward

Employee Trust Funds Board

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# Agenda

- FY21 Q4 Scorecard Review
- Review FY21 Strategic Plan Accomplishments
- Introduce ETF's FY22 Strategic Plan
- Next Steps

# ETF Scorecard

- FY21 Initiated ETF's Scorecard to track progress and guide decision-making
- Key measures capture status, predict outcomes.

# ETF Scorecard Report

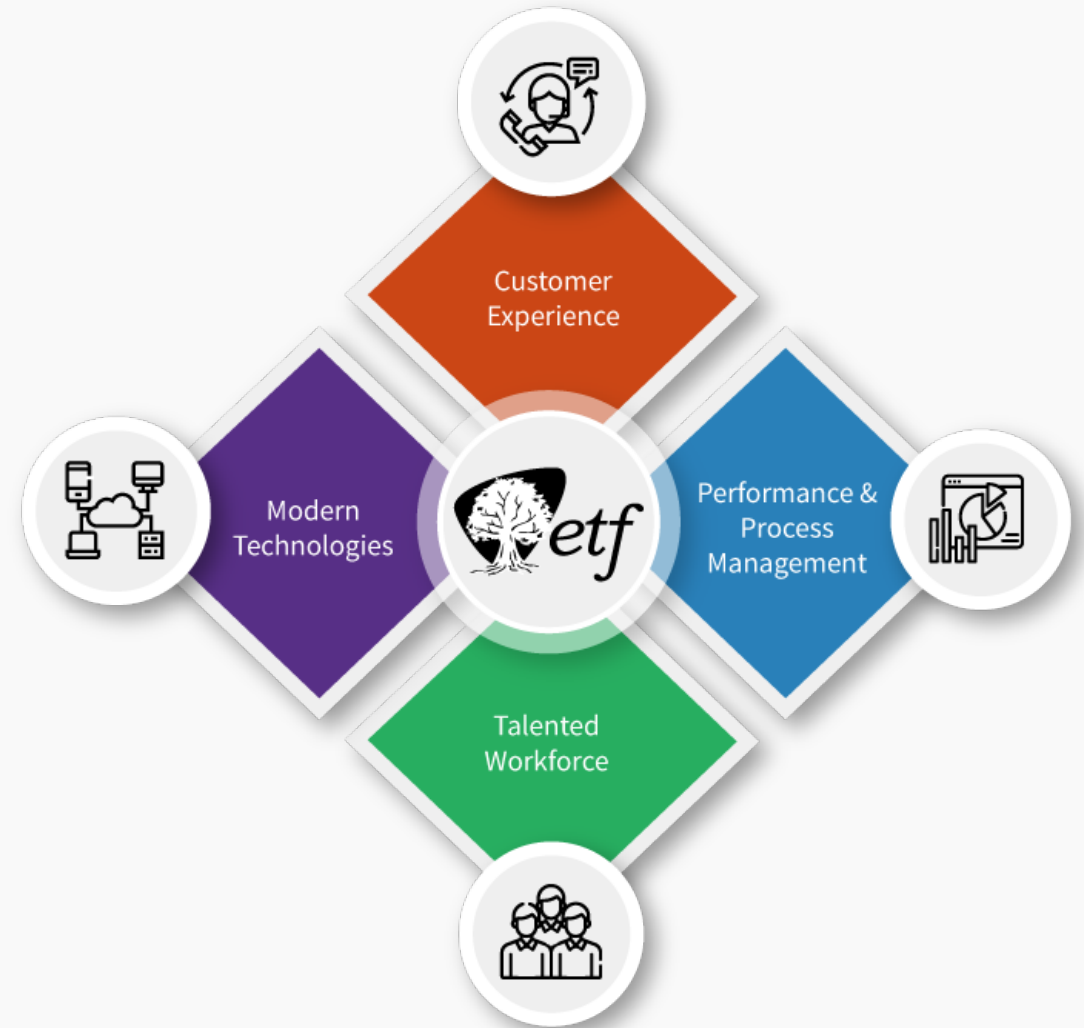
GOAL	MEASUREMENT	NORTH STAR TARGET	CURRENT YEAR TARGET	CURRENT PERIOD ACTUAL	PREVIOUS PERIOD ACTUAL	STATUS	NOTES
Create an effortless customer experience	% of customer experience survey responses that reflect a "delighted" experience score	91.40%	86.40%				Indicate dependencies on other metrics or initiatives, reporting frequency (i.e.: monthly, quarterly) along with any changes or issues impacting outcomes
	Average Wait Time SLA score of identified transactions	4 for all trxn	4 for HVHI trxn				
	Average Self-Service score for identified transactions	4 for all trxn	3 for HVHI trxn				
Implement outcomes-driven performance management and process management	% of Level 1 processes that are performing at expected service levels	90%	5%				
	% of Level 1 processes that are documented, with appropriate performance measures and controls in place	99%	20%				
	% of process improvement initiatives that result in improvement in at least 1 of the performance criteria	50	20				
Build a talented and agile work force	% of FTE new hires meeting proficiency requirements during the first 12 months of ETF employment	TBD	TBD				
	% of permanent FTE workforce meeting proficiency requirements, reported quarterly	TBD	TBD				
Implement modern, secure and resilient information technology	% of applications in the Invest quadrant of the Gartner TIME model	50%	17%				
	% of data meeting our data quality target score	97%	TBD				
	% of Key Risk Areas that are within established risk thresholds	8 of 9	7 of 9				



# ETF Strategic Plan

FY21

# Accomplishments



# ETF Strategic Plan Framework





## **Goal 1: Customer Experience**

### **Objectives**

- Increase employer competency for managing employee benefits
- Increase member engagement for managing their benefits





## **Goal 1: Customer Experience**

### **Accomplishments**

- Documented employer attributes to understand their training needs
- Piloted customized onsite and virtual member presentations for active employees of all ages
- Implemented a secure technology solution for online forms submissions
- Implemented online self-service scheduling tool





## **Goal 2: Performance & Process Management**

### **Objectives**

- Establish metrics to measure progress towards meeting desired outcomes of key capabilities
- Establish business process management to increase knowledge, improve operational efficiencies and controls, and to support innovation



## **Goal 2: Performance & Process Management**

### **Accomplishments**

- Developed business process management and improvement capabilities
- Completed 48 process improvement projects across the enterprise
- Expanded documentation of organizational business processes
- Completed system/application and database inventory for business capability model



## **Goal 3: Talented Workforce**

### **Objectives**

- Market our vision to attract, integrate, and advance top talent
- Advance employee development through meaningful performance management approaches
- Build the culture, recruitment and retention practices that will make ETF an equitable and inclusive organization



## **Goal 3: Talented Workforce**

### **Accomplishments**

- ETF Employee Value Proposition Development
- HR Share Point site
- New Employee Onboarding Process
- Competency-Based Performance Management: Core Competencies
- ETF Equity and Inclusion Plan: Year 1



## Goal 4: Modern Technologies

### Objectives

- Develop and deploy solutions that meet customer expectations for accurate and timely services
- Integrate systems and processes to deliver a seamless, timely and secure experience for all stakeholders



## Goal 4: Modern Technologies

### Accomplishments

- Insurance Administration System vendor selected
- Enterprise Content Management technology nearing completion
- Information Risk Management Program
- Data architecture implementation
- Technology Program implementation

# FY22 Strategic Plan

- What's new
- Strategic Priorities
- Next steps





## **Goal 1: Customer Experience**

### **Objectives**

- Increase employer competency for managing employee benefits
- Increase member engagement for managing their benefits
- Create full visibility to the end-to-end customer experience for IAS
- Ensure insurance program sustainability



## **Goal 2: Performance & Process Management**

### **Objectives**

- Improve operational performance management through effective process management, performance metrics, controls and improvement initiatives.
- Optimize processes to leverage capabilities of modernization activities



## **Goal 3: Talented Workforce**

### **Objectives**

- Attract, integrate, and advance top talent
- Advance employee development through meaningful and intentional performance management approaches
- Build the culture, recruitment and retention practices that will make ETF an equitable and inclusive organization



## Goal 4: Modern Technologies

### Objectives

- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.
- Integrate systems and data to support an effortless customer experience
- Preserve the safety and security of all ETF systems and data through standard practices, appropriate security controls, risk management, and information security technologies.

# Next Steps

- Resource prioritization
- Governance process
- Ongoing



**Questions?**

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# Thank you

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