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Correspondence Memorandum

Date: November 16, 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 September 30, 2022. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represent the first reporting period for the Fiscal Year (FY) 2023 ETF Scorecard. Of the 10 measurements for which we have available data, one is completed, seven are on track, and two are significantly off-track. Some notable developments during this reporting period include:

Goal 1: Create an effortless customer experience.

The following measurement was completed this quarter:

- **Customer experience roadmap milestones met**: The purpose of this initiative was to lay the foundation for developing a high-level customer experience roadmap. Foundational elements include enhancing our customers' experience by having a clearly defined vision, identifying customer attributes and segments, assessing our current state, and identifying and prioritizing customer experience improvement opportunities for selected personas to achieve the target destination. The work of this project sets the stage for planning the customer experience activities, events, and projects for FY23 and beyond to enhance the positive customer experiences aligning with the modernization roadmap, other strategic initiatives and agency priorities.

The following measurement is significantly off-track this quarter:

- **Percent of Group Insurance Board-approved projects on schedule**: The status change from "active" to "on-hold" for this measurement was highlighted in the FY22 Q4 Memo, due to the departure of a large health insurance vendor from the healthcare market that required key staff to prioritize finding replacement coverage for impacted members. This measure will resume "active status" in December 2022.

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ETF	12.08.22	5C
BUD	12.08.22	6

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

The following measurement was added to the FY23 ETF Scorecard and is significantly off track this quarter:

- **Cumulative number of the Insurance Administration System (IAS) future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place:** Due to limited resources, competing priorities and delays within the IAS implementation project, this measurement is significantly off-track. An adjustment has been made extending the future state documentation through 2024.

Goal 3: Build a talented and agile workforce.

This quarter, the following new measurement was added to the ETF Scorecard:

- **Percent of competency program tasks completed on schedule**: This new measurement involves advancing employee development through meaningful and intentional performance management approaches while preparing employees to take on the demands of our future. One of the ways we do this is through ongoing, intentional, and timely two-way conversations surrounding employee performance. ETF recently redesigned its annual performance management process to include five key components that create opportunities for staff to have more meaningful and intentional conversations surrounding employee performance throughout the year. The five key components are: goal setting, first check-in, mid-year evaluation, second check-in and final evaluation. This measure will report on non-probationary permanent employee progress towards completing the necessary tasks associated with the new performance management process.

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

ETF Scorecard FY2023 Q1 (July 1 -September 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 Customer Experience Feedback = customer perspective/service rating	91.40%	86.4%	85.2%	87.0%	On Target	Compared to last quarter, the score has fallen by 1.8 points. While scores from retirement appointments remain steady, the Call Center and website scores have decreased. The timing of the WEA Trust departure from the health insurance industry likely impacted our avenues where members go for information (the website and the call center). This was echoed in the web feedback. We received much more feedback, a 43% increase in responses over our average, and most of the feedback was on health benefits pages.

Measure	Target 1	Target 2	Col3	Col4	Status	Notes
Average Wait Time Service Level Agreement Score of identified transactions Average Wait Time Score = operations/ service delivery time	4 for all trxns	4 for HVHI trxns	3.9	3.7	On Target	The wait time score this quarter was slightly better than the previous quarter. ETF saw a slight improvement in the average speed of answer for member phone calls when compared to the past quarter. This is seasonal, as ETF typically receives fewer calls from members in the summer months. The two most notable areas ETF has not been able to meet the standard wait times were: • The average speed of answer for member phone calls • The time it takes for a member to meet with a benefit specialist for a retirement appointment. As this has been the pattern for years now, ETF submitted a budget request for additional positions to improve service in these areas.
Customer experience roadmap milestones met	100%	100%	100%	80%	On Target	COMPLETE. This measure will be updated for the remaining FY23 to track progress on the roadmap implementation tasks. Final tasks this quarter included: • 12 Core group meetings which included prepping for working sessions and presentations • 9 Working session meetings with project team to gather input on the roadmap components • Meeting to complete the project change request • Presentation to Strategic Council • Presentation to Agency Management Council • Meeting with Washington State Pension System CX Leader
Percent of Group Insurance Board-approved projects on schedule	100%	60%	50%	32%	Significantly Off Track	This initiative's status is on hold with only intermittent progress made due to limited resource availability and the extraordinary demands of Open Enrollment for benefit year 2023. Active status will resume in Q2.

Goal	Measure					Status	Comments
Goal 2: Implement outcomes-driven performance management and process management.	Percent of Enterprise Business Intelligence building blocks milestones met*	100%	100%	N/A	N/A	N/A	*New measurement Data not available until Q3.
	Cumulative number of IAS future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place*	100	30	1	N/A	Significantly Off Track	* New measurement This quarter one additional future state process was documented: Member Data Process. This measurement is significantly off track due to the limited resources, competing priorities and delays within the Insurance Administration System (IAS) implementation project. Documenting future state has been extended through 2024.
Goal 3: Build a talented and agile workforce.	Percent of employees whose expected performance management task(s) are completed by the end of the quarter*	100%	100%	100%	N/A	On Target	* New measurement ETF's annual goal setting process kicked off in July 2022. 100% of eligible employees completed the goal setting process within the quarter. A total of 795 goals were set using the system.
	Percent of competency program tasks completed on schedule	100%	100%	76%	66%	On Target	A high-level summary of items completed this reporting period include: • Successful completion of the goal setting process: 233 employees set goals using the new system and 795 goals were set. • Completion of the functional competency development selection process.
	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	Year 3 of the Equity and Inclusion Project started this quarter consisting of 10 initiatives; six are in progress, two have not been started, and two are completed including: • Surveyed staff to provide input related to equity and inclusion. • Promoted existing internal and external training opportunities to ETF staff. The 100% complete is based on initiatives scheduled for this quarter being completed on time.

Goal 4: Implement modern, secure, and resilient information technologies.	Percent of applications in the Invest quadrant of the Gartner TIME model **	60%	29%	28%	26%	On Target	The new HR Performance Module in Cornerstone was added this quarter, and the old HR manually-driven system was retired. The new system streamlines, automates and allows ETF to customize and track employee performance.
	Number of Key Risk Indicators that are within established risk thresholds	8 of 9	6 of 9	9 of 9	9 of 9	On Target	ETF's overall phishing click rates are improving, with this quarter averaging 6.08 compared to the previous quarter at 6.23. While still within metric limits, targeted training is being provided to individuals who do not pass the phishing tests. All staff are now tested for phishing monthly and the difficulty of our tests has increased to prepare users for more sophisticated attacks.

* New measurements being reported for this period.

** 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.