



STATE OF WISCONSIN  
Department of Employee Trust Funds  
A. John Voelker  
SECRETARY

Wisconsin Department  
of Employee Trust Funds  
PO Box 7931  
Madison WI 53707-7931  
1-877-533-5020 (toll free)  
Fax 608-267-4549  
etf.wi.gov

## Correspondence Memorandum

**Date:** February 24, 2023  
**To:** Employee Trust Funds Board  
**From:** Mark Lamkins, Director  
Office of Communications  
**Subject:** Communications Update

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

### In-person Group Retirement Appointments

The Department of Employee Trust Funds resumed offering in-person group retirement appointments in January, as a part of its phased, COVID-19 pandemic bounce back plan. Year-round sessions will be held statewide, but were initially scheduled through March in Milwaukee, Green Bay, Appleton, Cleveland, La Crosse, Wausau, and Whitewater.

Group retirement appointments can accommodate up to 12 members and their guests. An ETF benefits specialist reviews the same topics covered in an individual appointment, including:

- Retirement benefit estimates and application
- Health/life insurance
- Beneficiaries and death benefits
- Mailings members can expect to receive from ETF after retirement
- Annual annuity adjustments
- Wisconsin Retirement System return to work rules

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary  
Electronically Signed 03/08/23

Board	Mtg Date	Item #
ETF	3.23.23	7G

Currently, members can use the online appointment scheduling system or call ETF to schedule the following four different types of retirement appointments:

- Individual online
- Individual in-person at ETF offices in Madison
- Group online, available during the day and evening
- Group in-person, available statewide

Members must have received a *Retirement Benefit Estimates and Application* (ET-4301) or a *Disability Benefit Estimate and Application* (ET-5302) in order to schedule a retirement appointment.

### **Attendee Feedback**

How did you schedule your in-person group retirement appointment?

- 62% used the online appointment scheduling system
- 38% called ETF

How easy was it for you to schedule an appointment?

- 96% indicated “very easy” or “extremely easy”

How likely are you to recommend to your coworkers that they schedule an appointment with an ETF benefits specialist?

- 100% indicated “very likely” or “extremely likely”

How satisfied or dissatisfied are you with the information that you received?

- 85% indicated “very satisfied”

In general, attendee feedback was positive and will be used in the development of future benefits education.

- “My wife and I thoroughly enjoyed our time with Linda. It was well worth the time to visit and discuss all of the options. Linda answered all of our questions and was a joy to work with!”
- “I learned more at this appointment than I could have ever hoped for. Nate was amazing and made everything so easy to understand. I really believe I can make an informed decision on my retirement after Nate's presentation.”
- “With the group appointments, it would be also helpful to find some individual time to schedule if requested with the specialist on that date following the large group.”
- “Daytime mid-week appointment was difficult to plan for. Would have been nice to have a meeting for just employees that are teachers... [or] different groups of employees (i.e., law enforcement, medical personnel, university staff).”

### **Web and Video Analytics**

The attached quarterly analytics report for the ETF website and videos is for Quarter 4, 2022 (October-December). This quarter covers the majority of the annual open enrollment period for health benefits, September 26 – October 21, 2022. There was a 9.7% increase in site visitors compared to the previous quarter, and a 9% increase compared to the same time last year. As noted in the analytics report for Quarter 3, the increase in web traffic is likely due to the departure of WEA Trust from the state's health insurance market, which affected 52,000 members. There were also significant spikes when year-to-date investment returns were announced in November and December.

The top viewed video, with 1,086 views, was *Choosing a Plan Design*, which guides members through plan design options for their health insurance.

Among the top themes from web user feedback was difficulty finding how to apply for health insurance and finding information for the wrong plan year. These pain points will be reviewed as ETF makes improvements to web and health benefits materials for the next open enrollment period.

You will find a summary of findings at the end of the report.

### **Other Updates**

- **WDC Webinar** – More than 900 members attended the three-hour *Your Steppingstones to Retirement* webinar in February, which was hosted by the Wisconsin Deferred Compensation Program. Topics included the WRS pension, Social Security, and deferred compensation. There will be another session in March, and a video of the webinar will be available on the ETF website.
- **WRS in the Spotlight** – Secretary John Voelker was interviewed by Pew Charitable Trusts in an article, [Wisconsin Pension Official Details States Approach to Weathering Market Volatility](#), published in January. The WRS was cited as one of three public pension plans that has “delivered stability and sustainability through the economic ups and downs of the last two decades.”
- **Board Elections** – Tony Przybylski will fill the Technical College Teacher member seat for a second term and Michael Langyel will replace Esther Ancel in the Retired Teacher member seat on the Teachers Retirement Board; both are five-year terms beginning May 1, 2023. The Public School Teacher member seat on the Teachers Retirement Board remains vacant. The Educational Support Personnel member seat on the ETF Board will be vacant, effective May 1, 2023, when the current term is completed by Leilani Paul. The results of the election for the Annuitant member seat on the ETF Board are forthcoming.

Staff will be available at the Board meeting to answer questions.

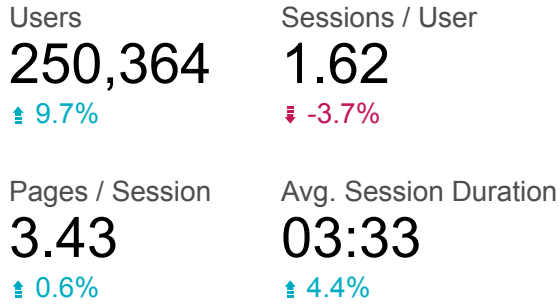
Attachment: 2022 Q4 Website and Video Analytics Report

# Web and Video Analytics

Quarter 4, 2022 | October 1- December 2022

This high-level overview report is prepared by the Office of Communications. All comparison figures are in reference to the prior quarter. For assistance with this report, please contact [ETFSMBCommunications@etf.wi.gov](mailto:ETFSMBCommunications@etf.wi.gov).

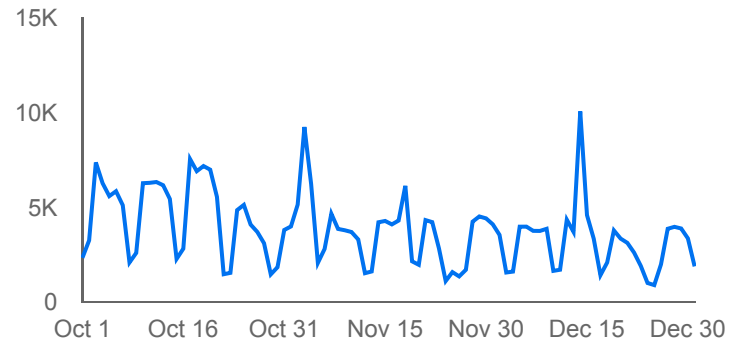
## User Engagement



The more engaged a user is, the more likely they are to return to our site (sessions/user), view more pages (pages/session) and stay longer (avg. session duration).

*A session is a user's visit to our site. A session ends after 30 minutes of inactivity or at midnight.*

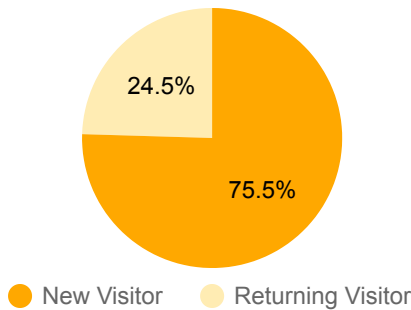
## Visitors by Day



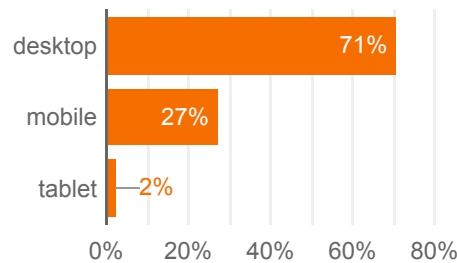
### Top days:

- **November 3 with 9,616:** ETF E-Mail Update on investment performance
- **December 14 with 10,211:** ETF E-Mail Update on preliminary investment performance

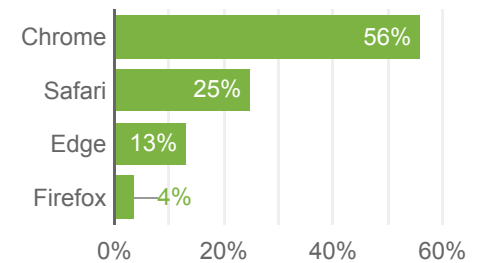
## User Types



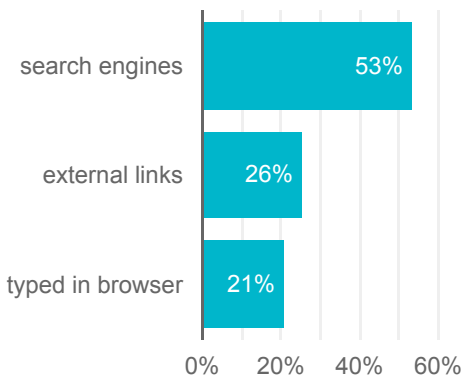
## Devices



## Top Browsers



## How Users Get to the Site



## Top External Link Sources

	Referrer	Users	Bounce Rate
1.	ETF E-mail Update	36,699	64%
2.	University of Wisconsin	10,739	31%
3.	deancare.com	1,235	19%
4.	www4.deltadentalwi.com	1,085	25%
5.	uwm.edu	742	22%
6.	prevea360.com	581	30%
7.	thconsumeradvantage.com	529	23%

*A bounce is when a user views only one page and then leaves. Bounce rate is calculated by counting the number of single page visits and dividing that by the total visits.*

# Can Users Find What They're Looking for?

Unique searches

**42,018**

⬆️ 7.5%

Total number of times the site search was used

Results Pageviews / Search

**1.6**

⬆️ 0.9%

How many times a visitor views the search results page after performing a search

Search Refinements

**22%**

⬇️ -3.1%

Percentage of searches where a user searched again immediately after performing a search

Search exits

**12%**

⬆️ 8.5%

Percentage of searches made immediately before leaving the site

# Top Search Terms

	Search Term	Searches ...
1.	decision guide	1,855
2.	2331	1,017
3.	schedule of benefits	683
4.	variable	667
5.	2023 decision guide	512
6.	health insurance	437
7.	wea trust transition	423
8.	et-2331	411
9.	group appointment	375
10.	additional contributions	338

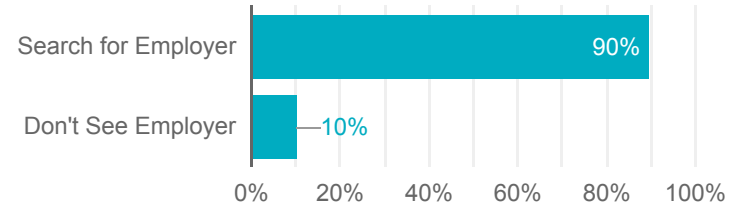
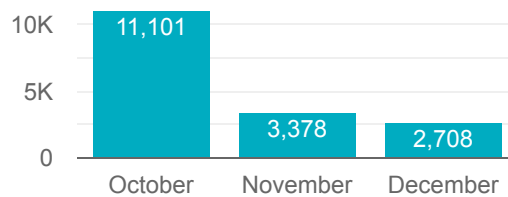
# Benefits Available to Me

On the [Benefits Available to Me](#) page, users can find their ETF-administered retirement, health, and other benefits by entering their current or last employer.

Employer Searches

**17,187**

⬆️ 4.7%



# Top Pages

	Page	Views	Bounce Rate
1.	Homepage	111,576	17%
2.	2023: Health Plan Search	59,123	32%
3.	Search	54,305	33%
4.	My Info	40,969	27%
5.	Latest Investment Performance	40,095	87%
6.	WRS Retirement Benefit	34,332	19%
7.	WRS Retirement Benefits Calculator	32,998	67%
8.	Benefits Available to Me	25,585	26%
9.	Contact Us	24,679	69%
10.	Insurance	23,590	18%

A bounce is when a user views only one page and then leaves. Bounce rate is calculated by counting the number of single page visits and dividing that by the total visits.

# Top PDF Downloads

	Title	File	Downloads
1.	Group Health Insurance Application/Change for Retirees	et2331	5,182
2.	It's Your Choice 2023 Decision Guide: State of Wisconsin Group Health Insurance for Employees	23et-2107	4,991
3.	Beneficiary Designation	et2320	2,540
4.	Group Health Insurance Application/Change Form	et2301	2,127
5.	Wisconsin Retirement System Administration Manual	et1127	1,925
6.	It's Your Choice 2023 Decision Guide: State of Wisconsin Group Health Insurance for Retirees	23et-2108	1,922
7.	Your Benefit Handbook	et2119	1,554
8.	Direct Deposit Authorization	et7282	1,505

# User Feedback

Visitors can provide feedback on any page through the feedback tab. The feedback tab lets users rate the page with an emoji scale, from hate (a numeric score of 1) to love (a numeric score of 5).

## Overview

Average Score

**2.75**

↓ -18.2%

Feedback Received

**136**

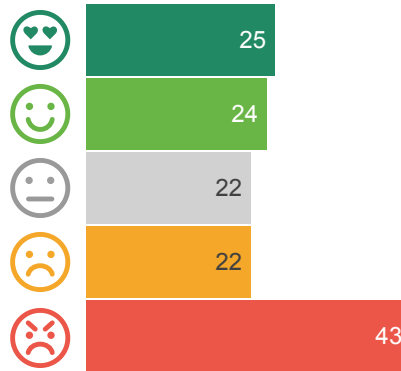
↓ -4.9%

Feedback with Comments

**63**

↓ -13.7%

## Scores From All Pages



## Top Themes from Comments

Want online account access

Difficulty finding out how to apply for new health insurance

Finding information from the wrong plan year

## Top Reviewed Pages

Address	Feedback Received	Average Score
<a href="https://etf.wi.gov/">https://etf.wi.gov/</a>	20	3.3
<a href="https://etf.wi.gov/benefits-by-employer">https://etf.wi.gov/benefits-by-employer</a>	8	2.25
<a href="https://etf.wi.gov/retirement">https://etf.wi.gov/retirement</a>	8	2.5
<a href="https://etf.wi.gov/wrs-performance/annual-returns-rates-and-adjustments">https://etf.wi.gov/wrs-performance/annual-returns-rates-and-adjustments</a>	6	3.5
<a href="https://etf.wi.gov/insurance">https://etf.wi.gov/insurance</a>	5	2.6
<a href="https://etf.wi.gov/wrs-performance/latest-investment-performance">https://etf.wi.gov/wrs-performance/latest-investment-performance</a>	5	2.6
<a href="https://etf.wi.gov/news/pay-attention-year-end-deadlines-1">https://etf.wi.gov/news/pay-attention-year-end-deadlines-1</a>	4	4

## Top Watched Videos

Video Title	Views	Average View Percentage
1. Choosing a Plan Design	1,086	78%
2. Choosing When to Retire	868	75%
3. Applying for Retirement	867	87%
4. The Variable Fund	753	67%
5. Transitioning Care to a New Health Plan	734	78%
6. 2023 Open Enrollment Preview	666	81%
7. Health Benefits in Retirement (Overview)	640	73%
8. How to Use ETF's Online Retirement Calculator	542	61%
9. Accumulated Sick Leave Credit Conversion Program Overview	541	83%
10. Replaced 12/3/2022 - How to Fill Out Your Retirement Benefit Estimates and Application (ET-4301)	529	57%

*Average percentage viewed is the percent of each video the average viewer watched.*

# Report Summary

## Open Enrollment and Investment Performance Drive Web Traffic

Historically we expect to see an increase in web traffic in quarter 4 due to health benefits open enrollment at the beginning of the quarter. This year we saw a 9.7% increase in visitors over the previous quarter, and a 9% increase in visitors over this quarter last year. This large increase compared to last year's traffic is likely due to the departure of WEA Trust, which affected 52,000 members.

Decision guides, 2331 (ET-number for the health insurance application), schedule of benefits, WEA Trust Transition and other health insurance terms were among the top search terms. Our top viewed video, with 1,086 views, was Choosing a Plan Design which guides members through plan design options while choosing a new health insurance. Four other health insurance-related videos made the top 10.

Open enrollment also bolsters the use of our Benefits Available to Me tool. During the month of October, the tool was used 230% more than it was used in the months following.

While there was a slight decrease in the amount of web feedback received from last quarter, the overall amount of web feedback in quarter 4 remains high. The top themes from web feedback:

- Members want online account access
- Difficulty finding out how to apply for new health insurance
- Finding information for the wrong plan year

ETF staff are reviewing this feedback, along with feedback collected through open enrollment lessons learned activities, to identify user pain points and prioritize improvements for the web and health benefits materials.

Investment performance was another major driver of web traffic. The Latest Investment Performance page is our fifth most viewed page. ETF E-Mail Updates on investment performance occurred on two of the days with the highest web traffic.