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Correspondence Memorandum

Date: June 9, 2023
To: Employee Trust Funds Board
From: Pam Henning, Assistant Deputy Secretary
Office of the 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' (ETF's) scorecard for the period ending March 31, 2023. These performance measurements provide the Employee Trust Funds Board (Board) an objective way to measure progress toward ETF's four strategic goals and represent the third reporting period for the fiscal year (FY) 23 ETF Scorecard. Of the 11 measurements for which we have available data, nine measurements are on track, and two measurements are significantly off-track. Some notable developments during this reporting period include:

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

The following measurement is significantly off-track this quarter:

- **Cumulative number of Insurance Administrative System (IAS) future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place:** Six new processes have been documented this quarter, including:
 - Income Continuation Insurance (ICI) through Evidence of Insurability (EOI): this is the process for enrolling in ICI at any point in the year through Evidence of Insurability.
 - Enroll in Life insurance through EOI: This is the process for enrolling in Life insurance at any point in the year through EOI.

Due to limited resources, competing priorities and delays within the IAS implementation project, this measurement remains significantly off-track. An adjustment has been made extending the future state documentation through 2024.

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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:** ETF's mid-year evaluation process kicked off in February of 2023 and reached 100% task completion in April of 2023. This was a new process for ETF and following a review of the current 2022-2023 performance management cycle and the feedback received from staff, the process has been streamlined to allow staff more time to focus on the goal setting, mid-year, and final evaluation processes. In the coming months, the mid-year evaluation results will be analyzed in greater detail.

This measurement is significantly off-track this quarter:

- **Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule:** With the departure of ETF's Equity and Inclusion Officer, progress on the number of tasks completed on the Equity and Inclusion Plan was significantly impacted due to lack of resources. Despite this resource loss, several key tasks were completed including:
 - Staff Network Groups (SNGs) were launched to provide opportunities for staff to voluntarily build community with others across business units who have shared characteristics, identities, and/or interests, with potential topics including mental health advocates; military veterans; culture, race, and ethnicity; young professionals; and people with disabilities.
 - On January 5, 2023, the Equity & Inclusion Officer conducted a stay interview training and orientation session for 8 ETF managers. Those managers subsequently conducted stay interviews with 12 employees. The information collected from those interviews was provided to HR and has been used to identify strengths of ETF's current practices, and opportunities to further meet the needs of our workforce.

Active recruitment for a new Equity and Inclusion Officer was underway during this reporting period, and the measurement is expected to return to "on track" status with this position filled.

ETF's strategic planning process is currently underway and will be shared at the September ETF Board meeting along with a recap of the FY 2023 Strategic Plan accomplishments.

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

Attachment A: [ETF Scorecard FY 2023 Q3 \(January 1–March 31, 2023\)](#)