ETF Scorecard FY2023 Q3 (January 1-March 31, 2023)

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%	87.0%	79.7%	On Target	The 7% increase in this quarter's Customer Experience Feedback Score was expected, as the previous quarter included the annual member engagement survey feedback. Compared to surveys that are tied to high-touch interactions (retirement appointments or calls to the call center), the member engagement survey receives lower satisfaction and net promoter scores. Q3 scores from the call center survey remained steady, scores from the retirement appointment survey showed a modest increase in customer ease, and scores from the web survey showed an increase in satisfaction.
	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	3.7	3.9	On Target	This quarter's Average Wait Time score was slightly lower than last quarter. Consistent with past reports, the two most notable areas for which 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. This has been an ongoing pattern, and ETF submitted a budget request for additional positions in these areas to address this performance challenge. In adition, this quarter's wait time was further impacted by the slight increase in quarterly call volume due to federal tax changes affecting retirees, with the Call Center receiving 19,658 calls in March 2023 compared to 19,105 calls in March 2022 (3% increase).
	Customer experience Phase 1 roadmap milestones met	100%	100%	60%	10%	On Target	Items completed this quarter include: • Developed and began executing a CX transition management plan including communication strategies and actions. • Integrated CX into existing governance structure. • Convened a group of subject matter experts to develop and publish Power of Attorney content for members and their agents. • Elicited a Statement of Work from existing automated call distribution (ACD) vendor for voice-to-text translation and sentiment analysis on high-effort, low-satisfaction contacts to the call center. • Developed a plan for gathering Voice of TFS Employees (VoE) as the face and voice of the agency with customers on CX.
	Percent of Group Insurance Board-approved projects on schedule	100%	60%	73%	65%	On Target	The Mental Health Parity Website has been published and efforts are now focused on the High Deductible Health Plan and Social Determinants of Health projects.
Goal 2: Implement outcomes-driven performance management and process management.	Percent of Enterprise Business Intelligence building blocks milestones met	100%	100%	50%	50%	On Target	The Business Intelligence Roadmap was approved by the Data Governance Council and is being incorporated into the 2023-2025 Data Strategy. This effort will help to prioritize critical reporting and analytics work that has been delayed due to modernization and resource constraints. Examples include moving insurance and pension data into the data warehouse for reporting which will be used to make key business decisions.

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	Cumulative number of IAS future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place	100	30	6	0	Significantly Off Track	This measurement remains 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. This quarter six additional future state processes were documented including: • Changes to the BenefitFocus Implementation Requirements Document and associated files to ensure all approvals and appropriate updates are accounted for. • Enroll in 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. • ICI Premium Waiver and ICI Stop Premium Waiver processes: These are processes to either waive a member's premium when an approval notice is received, or to remove the waiver when notified. • Consolidated (group) billing: This process bills employers for Health Insurance and Income Continuation Insurance.
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%	97%	100%	On Target	ETF's mid-year evaluation process occurred in February 2023, 218/225 (97%) of eligible employees completed the mid-year evaluation task within the quarter. The target completion date was 3/31/23 and 100% completion was achieved on 4/6/23.
	Percent of competency program tasks completed on schedule	100%	100%	98%	91%	On Target	98% of the overall project effort is complete (7% gain since prior reporting period). A high-level summary of items completed this reporting period include: • In-person Supervisor performance management training • Successful launch of the mid-year evaluation process.
	Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule.	100%	100%	30%	100%	Significantly Off Track	The 30% complete is based on the tasks completed on schedule for the reporting period. The departure of the Equity and Inclusion Officer reduced resource availability, impacting progress on tasks completed. Several tasks needed to be put on hold and will carry over to the FY24 Strategic Plan. Tasks completed this period include: • Schedule E & I educational and awareness sessions for staff on issues and topics related to diversity. • Launched Staff Network Group • Conducted stay interviews
Goal 4: Implement modern, secure, and resilient information technologies.	Percent of applications in the Invest quadrant of the Gartner TIME model **	60%	29%	28%	28%	On Target	During this reporting period, there were no systems added to the Invest Quadrant and no systems retired from the Eliminate Quadrant. Data gathered this quarter indicates our portfolio is now 28% modernized, which is on target for our FY23 goal of 29% of ETF's applications in the Invest Quadrant of the Gartner TIME model.

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	Number of Key Risk Indicators that are within established risk thresholds	8 of 9	6 of 9	9 of 9	8 of 9	On Target	100% of the Key Risk Indicators were achieved this quarter, accomplished by effective cross-functional teams and partnerships with other areas to address issues in a timely manner. Tasks completed this quarter continue to grow our risk aware culture and include: • deployed customized performance dashboards for managers and supervisors on the status of their teams' performance with phishing tests and training. • presented Cybersecurity training to more than 130 ETF staff on a variety of topics focused on actionable cybersecurity practices.

* 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.