

# ETF's Strategic Plan Annual Update

## Item 5B – Employee Trust Funds Board

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Office of the Secretary



# Informational item only

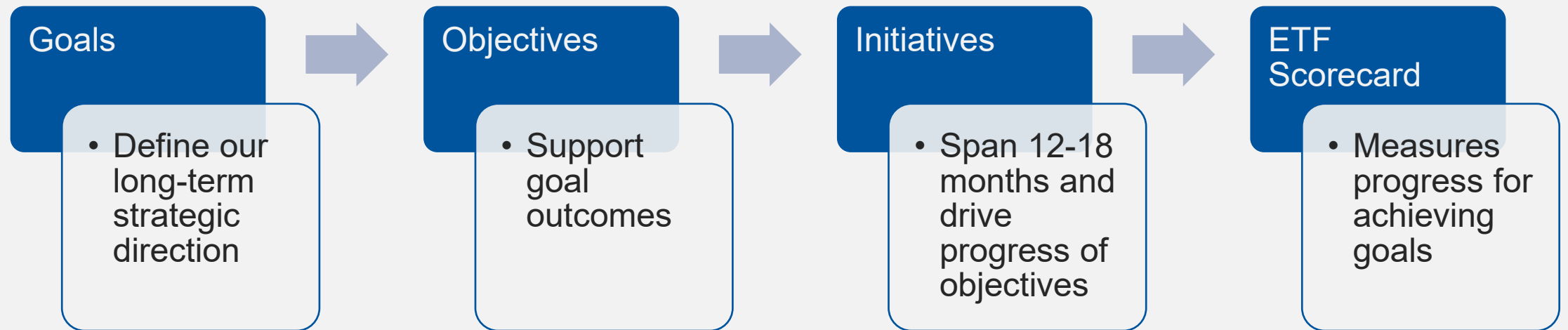
- No Board action is required.

# Agenda



- Review FY23 Strategic Plan Accomplishments
- Introduce ETF's FY24 Strategic Plan
- Next Steps

# ETF Strategic Plan Framework

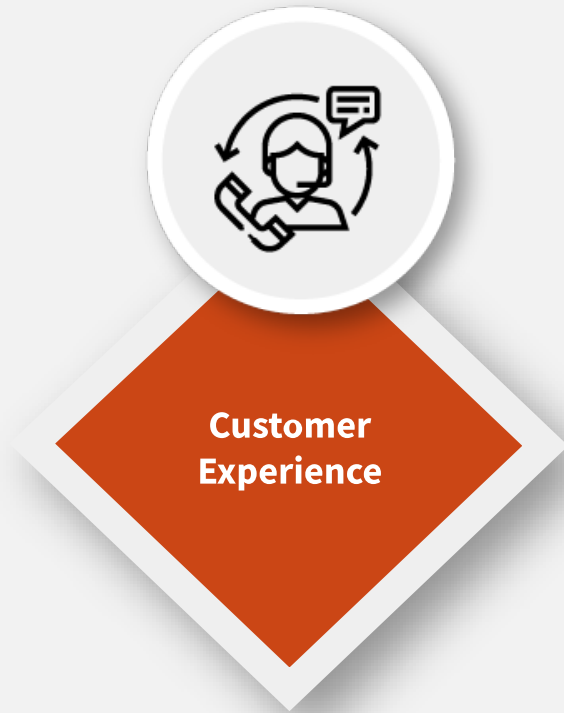




# ETF Strategic Plan

## FY23 Accomplishments

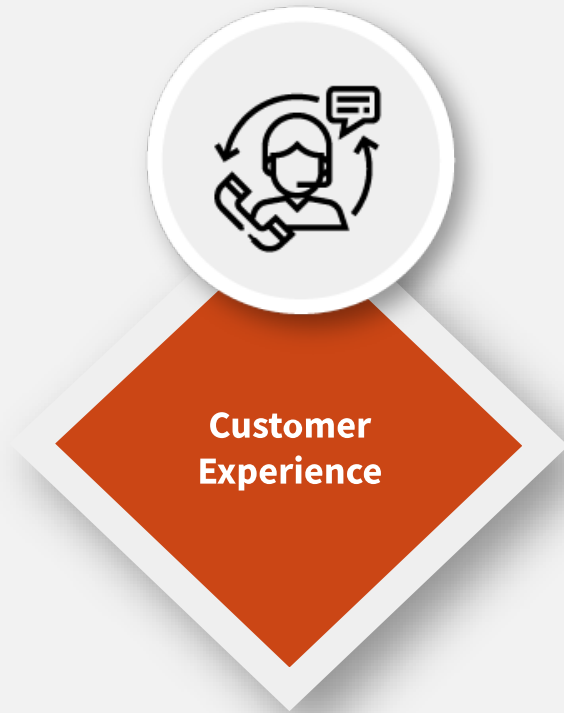
# FY 23 Goal 1: Customer Experience Objectives



- Configure and implement Cornerstone application to support capture and use of employer data and engagement strategies.
- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements
- Ensure insurance program sustainability

# FY 23 Goal 1: Customer Experience

## Accomplishments



- Completed the conversion of six WRS Employer training modules to a more user-friendly technology for employers
- Established the governance, transition management and communications components of the Customer Experience roadmap.
- Completed Specialty Pharmacy and Mental Health initiatives as approved by the Group Insurance Board

# FY 23 Goal 2: Performance & Process Management

## Objectives



Performance &  
Process  
Management

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



# FY 23 Goal 2: Performance & Process Management

## Accomplishments



Performance &  
Process  
Management

- Developed Enterprise Business Intelligence Roadmap.
- Ongoing progress documenting future state Insurance Administration System processes.

# FY 23 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

# FY 23 Goal 3: Talented Workforce

## Accomplishments



- Completed first year of the Employee Performance Management System
- Rolled out data science training education to staff
- ETF Equity and Inclusion Plan: Year 3

# FY 23 Goal 4: Modern Technologies

## Objectives

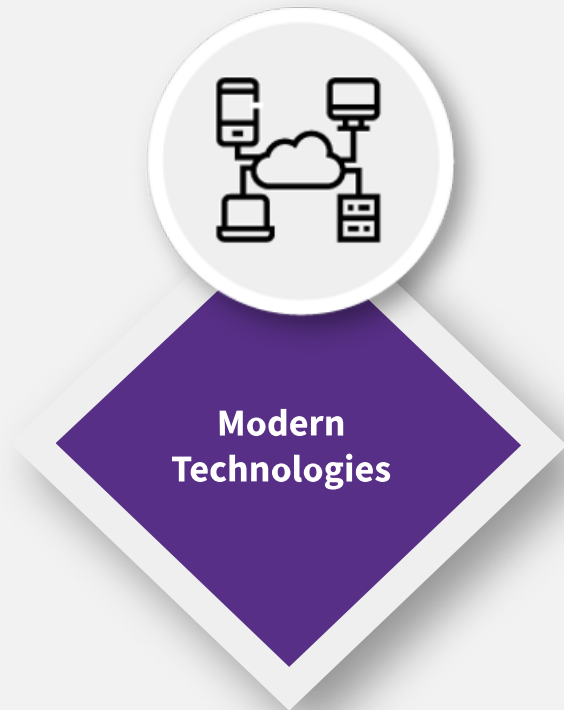


**Modern  
Technologies**

- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.
- Integrate systems and processes 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.

# FY 23 Goal 4: Modern Technologies

## Accomplishments



- Implemented Enterprise Content Management technology
- Insurance Administration System Progress
- Information Risk Management Program
- Data Program implementation
- Technology Program implementation



# FY24 Strategic Plan



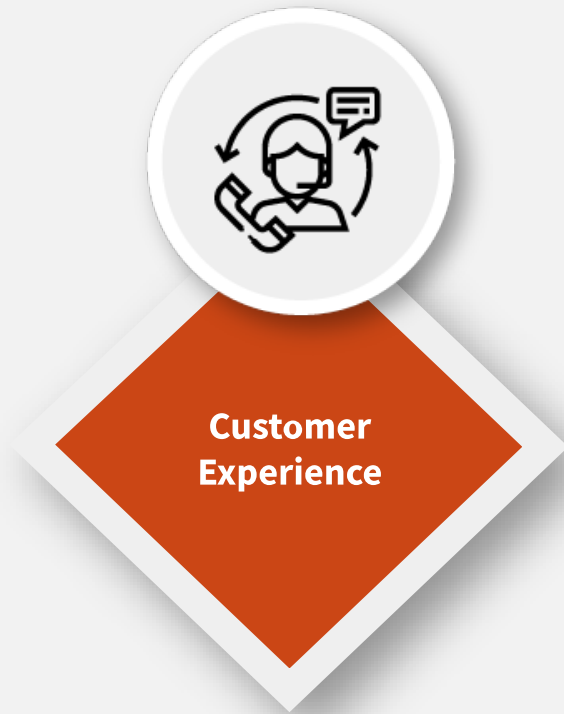
# FY 24 Strategic Planning Process



Strategic Plan Pilot collaboration between Strategic Council, Agency Management Council and Board of Managers to:

- Broaden operational and strategic insights
- Empower and engage leadership
- Co-author ETF's strategy

# FY 24 Goal 1: Customer Experience Objectives



- Increase employer competency for managing employee benefits.
- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements.
- Ensure insurance program sustainability.



# FY 24 Goal 2: Performance & Process Management

## Objectives



Performance &  
Process  
Management

- Optimize processes to leverage capabilities of modernization activities.

# FY 24 Goal 3: Talented Workforce

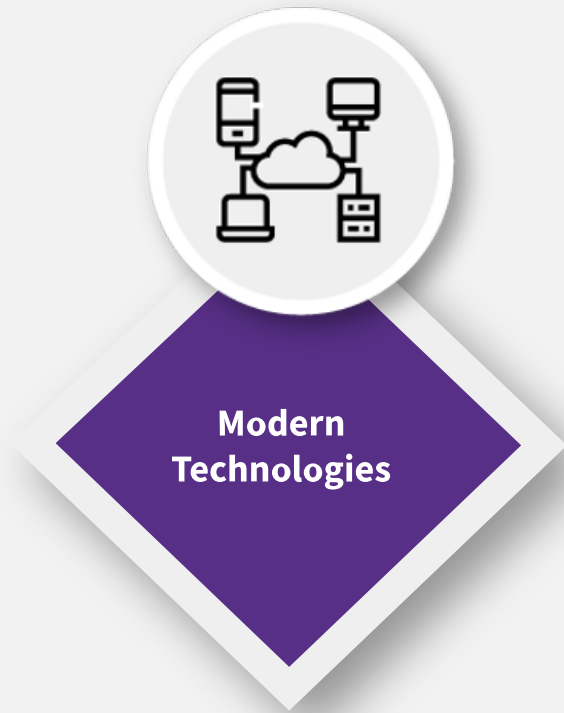
## Objectives



- 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.

# FY 24 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



Ensure alignment of resources to priorities



Continue refining data for reporting and decision-making

# Next Steps: Governance

Focus: continuing to strengthen and mature governance processes

## Strategic Council

- Setting the agency's strategic direction and defining priorities

## Agency Management Council

- Enhancing alignment of business operations
- Collaborating to improve agency performance
- Approving agency policies

## Data Governance Council

- Oversight of the agency's data lifecycle from creation, use, storing and confidentiality

## Portfolio Committee

- Resource prioritization oversight
- Recommendations for project alignment



**Questions?**

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# Thank you

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