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Correspondence Memorandum

Date: September 6, 2023

To: Budget and Operations Committee
Employee Trust Funds Board

From: Pam Henning, Assistant Deputy Secretary
Office of the Secretary

Subject: ETF Organizational North Star Metrics Report

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 June 30, 2023. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represent the fourth reporting period for the Fiscal Year (FY) 2023 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 are detailed in this memo.

Goal 1: Create an effortless customer experience.

Completed Measurements

The "Customer experience Phase 1 roadmap milestones met" measurement was completed. This initiative built on earlier work to identify strategies promoting a customer-centric culture at ETF. The work of this initiative established the governance and laid the foundation for organization-wide understanding and buy-in needed to move into the Customer Experience (CX) roadmap phase 2 strategic initiatives, projects, and activities. Milestones completed this quarter include:

- Employee experience components of the roadmap, which includes documenting the customer-facing trust fund specialist experience to identify nearly 80 improvement opportunities.
- Customer experience transition management and communications component of the roadmap, which includes publishing a Customer Experience SharePoint site providing access for all ETF employees to the artifacts and materials related to development and execution of the CX roadmap and developed the content for a CX video for the September 2023 all-staff town hall meeting.

Board	Mtg Date	Item #
BUD	09.21.23	7
ETF	09.21.23	5F

On Hold Measurements

The “Percent of Group Insurance Board-approved projects on schedule” measurement is on hold. This is due to prioritization of the Insurance Administration System (IAS) and It’s Your Choice annual open enrollment activities.

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

Completed Measurements

The “Percent of Enterprise Business Intelligence building blocks milestones met” measurement was completed. This initiative developed a roadmap, data strategy, and business intelligence implementation plan to prioritize and connect data across different systems and business processes. Ongoing work is being executed through existing strategic initiatives for the data warehouse, data literacy, data quality, and data governance.

Significantly Off-Track Measurements

The “Cumulative number of IAS future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place” measurement is significantly off-track. This is due to limited resources, competing priorities, and delays within the IAS implementation project. Progress made this quarter includes documentation of eight additional IAS future state processes, such as:

- Identity Proofing Support Call Processes.
- IAS Support Call Processes.
- Paper Insurance Application Processes for both active and retired members.

An adjustment has been made extending the future state documentation through 2024.

Goal 3: Build a talented and agile workforce.

Completed Measurements

The “Percent of employees whose expected performance management task(s) are completed by the end of the quarter” measurement was completed. ETF’s final evaluation process was from May 1–June 30, 2023, and reached 100% task completion in July 2023. This measurement reported on non-probationary permanent employee progress towards completing the necessary tasks associated with the new performance management process by the appropriate deadlines.

The “Percent of competency program tasks completed on schedule” measurement was also completed. This measurement tracked the project tasks and deliverables associated with developing and implementing a competency model, a performance management system, and institutionalizing modern leadership and staffing practices. A high-level summary of items completed this reporting period include:

- Successful completion of the mid-year evaluation process.
- Successful launch of the final evaluation process.

- Finalized the approach for the 2023-2024 performance management process.

Significantly Off-Track Measurements

The “Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule” measurement is significantly off-track. With ETF’s Equity and Inclusion Officer hired during this reporting period, progress on this measurement was limited. Progress made during this period include:

- Facilitating activities related to helping staff with stress and anxiety management.
- Launching the first Staff Network Group meeting.

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

Attachment A: [ETF Scorecard FY 2023 Q4 \(April 1–June 30, 2023\)](#)