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Correspondence Memorandum

Date: November 29, 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.

Website Improvements

Prior to the open enrollment period for health and other insurance benefits this fall, the Department of Employee Trust Funds (ETF) launched a new [Benefits Dispute](#) page. Here members can learn about the benefits dispute process for insurance, retirement, and disability benefits, and how ETF’s Ombudsperson Services can assist them.

The information had always been on the website, but it took several clicks to find it. Now members can quickly get what they need using the top navigation or search.

We kept it simple with plain language and provided the steps members should take to resolve their benefits-related issues. There are links to contacts for health plans, vendors, and other resources for taking informal action to file a grievance. Ombudsperson Services helps members with enrollment and eligibility, billing, prior authorization, and other insurance coverage issues.

Jailers Law

Another area on the website that has been updated are resources for members and employers about the jailers law (2023 Wisconsin Act 4), effective January 1, 2024. In general, Act 4 allows county correctional officers, both current and new hires, the opportunity to be classified as a protective occupation employee under the Wisconsin Retirement System, regardless of whether their employer classifies the jailer as a general employee. The Board has been kept apprised of this legislation and its impact on the Wisconsin Retirement System.

The [2023 Wisconsin Act 4 for Jailers](#) page provides important information on opt-out deadlines, examples of how take-home pay for general versus protective occupation employees will be affected under Act 4, links to helpful tools such as the WRS

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Reviewed and approved by Pam Henning, Assistant Deputy Secretary
 Electronically Signed 12/04/2023

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retirement benefits calculator, and answers to frequently asked questions on retirement benefits, taxes, and other topics. There are also [resources for county employers](#) to help them with WRS administration related to Act 4.

To provide another way for members to learn about Act 4, we are producing an educational video that uses easy-to-understand infographics. The plan is to distribute the video to county employers and make it available on the ETF website in December. A listing of ETF's efforts, including member outreach, will be presented by Matt Stohr at the Board's meeting on December 14, 2023 ([Ref. ETF | 12.14.23 | 4E2](#)).

Web and Video Analytics

We recently completed the transition to Google Analytics 4 (GA4), which changes some website calculations and measures in the attached report for Quarter 3, 2023 (July-September). Most notably, GA4 replaces the bounce rate with engagement rate, and comparisons of data will not be available until after this quarter's reporting period and one complete calendar year.

The majority of the 217,676 visitors used the Chrome browser and came to the website via a search engine rather than direct links or typing the URL in the browser. They gave the site's content a 3 out of 5 score on a 1 to 5 scale with 5 being the best. Following past trends, there are spikes in visitors when WRS investment performance is announced and at the beginning of the health benefits open enrollment period.

For more details, please see the summary at the end of the report.

Member Engagement Survey

ETF has been conducting an annual member engagement survey for benchmarking with peer retirement systems since 2018, as a participant in the CEM Engagement Consortium. The Board was presented the results of the [2022 survey](#) at its meeting in June. Over the years, ETF has consistently received a high member engagement score compared to peers and feedback from members that they want more education about benefits and online account access.

CEM and partner, CalSTRS, have announced the sunsetting of the consortium in 2023. As a result, ETF will discontinue the current survey. Like other consortium participants, we have found that to pinpoint customer pain points and improve the customer experience, the focus needs to be on specific activities or interactions.

CEM is starting a new Voice of the Customer (VoC) framework and allowing ETF to participate in the development process. The VoC will be open source for any pension system to apply set questions to measure members' level of satisfaction with specific activities, capture data over time, and compare to peers. Examples of activities include telephone calls, a secure website, new members, and active or inactive status to retirement. The data and analysis will be anonymized. Our work with CEM should be

informative as we move forward with Strategic Initiative 1.3.3 to initiate planning for a more holistic future state VoC program at ETF.

We are also continuing to track members' levels of satisfaction, effort, and willingness to recommend ETF services (Net Promoter Score) for different touch points, including the website, call center, and retirement appointments. This provides some general insights into the customer experience (CX) from the customers' perspective. Data is compiled for the CX Feedback Score, which is regularly reported to the Board in the Organizational North Star Metrics Report provided by Assistant Deputy Secretary Pam Henning.

In addition, ETF has developed a user survey for the new Insurance Administration System that is planned to go live next summer.

Presentations by Leadership

The below table includes presentations to Wisconsin stakeholder groups. These executive-level presentations are in addition to ongoing outreach activities and staff presentations at national conferences and events.

Group/Event	Date	Topic	ETF Presenter
Wisconsin Retired Educators Association Fireside Chat	June 8, 2023	Meeting Our Dependability Obligation	Secretary John Voelker
National Association of State Retirement Administrators Annual Conference	August 7, 2023	New Vistas in Customer Experience	Secretary John Voelker
Wisconsin Counties Association	September 18, 2023	WRS / Jailers Law Update	Administrator of Division of Retirement Services Matt Stohr
Wisconsin Retired Educators Association Annual Conference	September 27, 2023	Wisconsin Retirement System – The WRS and You	Secretary John Voelker
UW-Madison Retirement Association	October 10, 2023	Annual Health Plan Update	Office of Strategic Health Policy Director Eileen Mallow and others

Other Updates

- Two new educational videos were released in September: The [Well Wisconsin Program](#) video with information on benefits, eligibility, how to sign up, use the wellness mobile application, and earn the incentive; and the [Pre-Tax Savings Program](#) video series that describes the different types of accounts, enrollment process, and resources for members.
- The Wisconsin Deferred Compensation Program and its third-party administrator, Empower, hosted webinars during National Retirement Security Month in October to help members achieve financial wellness and a secure financial future.
- In November, 585 members attended the popular *Your Steppingstones to Retirement* webinar, which covers the WRS, Social Security, and the Wisconsin Deferred Compensation Program. The sessions were recorded and will be available soon as an updated [video series](#) on the ETF website.

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

Attachment A: [2023 Q3 Website and Video Analytics Report](#)