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Correspondence Memorandum

Date: November 27, 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 (ETF) scorecard for the period ending September 30, 2023. These performance measurements provide the Employee Trust Funds Board (Board) with an objective way to measure progress toward ETF's four strategic goals and represent the first reporting period for the Fiscal Year (FY) 2024 ETF Scorecard. Of the seven measurements for which we have available data, all measurements are on track. Some notable developments during this reporting period are detailed in this memo.

Goal 1: Create an effortless customer experience.

The "Average Wait Time Service Level Agreement Score of identified transactions" measurement is exceeding its current fiscal year target. The wait time score measurement improved over the previous quarter to exceed its current fiscal year target and was driven by:

- Increased average speed of answer due to position vacancies being filled.
- Call volume related to federal tax changes in early 2023 leveling off during this reporting period.

Additionally, when compared to the same reporting period last year, call volume was significantly decreased during the It's Your Choice 2024 open enrollment period because there were no significant health plan changes.

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

The “Cumulative number of Insurance Administration System (IAS) future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place” measurement changed from “Significantly off Track” to “On Target” since the previous reporting period.

Key process decisions and progression of the overall project that were challenging progress during the previous reporting cycle have been resolved. During this reporting period, 22 additional future state processes have been documented, including:

- Dual Employment: This is when a member is employed in more than one WRS-eligible position.
- State-to-State Transfers: This is when a member is terminating from one state position and being hired in another state position within 30 days.
- Late Open Enrollment: This is when a member is submitting an appeal to enroll in It's Your Choice benefits after the open enrollment period has closed.

Goal 3: Build a talented and agile workforce.

The “Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule” measurement changed from “Significantly off Track” to “On Target” since the previous reporting period.

ETF's Equity and Inclusion Plan FY 24-26 Year 1 plan development is underway and on track. ETF completed and submitted the initial draft plan on time and within the appropriate guidelines to the Department of Administration's Bureau of Equity and Inclusion. This was accomplished under an unusually short lead time thanks to the efforts of the Equity and Inclusion Planning workgroup.

The plan includes two initiatives expected to begin in the Q3 reporting period:

- Collaboration between ETF's Inclusion Diversity Equity Advancement Committee (IDEA) and ETF's Wellness Workgroup to align efforts to increase engagement in these programs.
- Advance Staff Networking Group (SNG) engagement, which was created to increase staff connections and promote dialogue around equity and inclusion topics.

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