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## Correspondence Memorandum

**Date:** March 8, 2024

**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 Committee or Board action is required.**

Attached is the Department of Employee Trust Funds (ETF) scorecard for the period ending December 31, 2023. These performance measurements provide the Board an objective way to measure progress toward ETF's four strategic goals and represent the second reporting period for the FY24 ETF Scorecard. Of the seven measurements for which we have available data, all measurements are on track. Some notable developments during this reporting period include:

### 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:** The Customer Experience (CX) Feedback Score for FY24 Q2 remained at 88%. It's worth noting:
  - This score does not include data from the Annual Member Engagement Survey that is conducted in November, because the survey was discontinued due to a new CEM CX benchmarking initiative. Even without this data, the CX Feedback Score was eight points higher than the same quarter in the previous fiscal year.
  - The ETF website user satisfaction score (aka, NSAT) increased by eight points since last quarter. Typically, in October, we see a decrease in this score due to open enrollment. However, benefit changes and plan disruption for 2024 were insignificant compared to the previous fiscal year.

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

- **Cumulative number of future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place:** During this reporting period, 24 future-state processes were documented, including:
  - Rehires within 30 days — This process describes how the rehires within 30 days are identified in our system, to ensure there is no gap in coverage and the correct employer is being billed.
  - Life to Health/LTC Conversion — This process enables members to convert their life insurance to either cover health insurance premiums or Long-Term care premiums.
  - Medicare and HDHP plan changes — This process enables employers to move active employees that have Medicare on file to a non-High Deductible Health Plan (HDHP) and enables ETF to move retirees to a non-HDHP plan when either them or their dependents have Medicare.

**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:** With no active annual performance management cycle tasks scheduled for this reporting period, the current period actual reported for this period is 0%. However, in anticipation of the mid-year evaluation cycle (January 2-February 29, 2024) the following activities were accomplished:
  - All eligible employees completed a required training on the performance management process, received assistance in choosing goal topics, and guidance on creating a performance management goal.
  - A refresher training for supervisors was offered.
  - Informational articles were published in the *ETF Community* internal blog, to keep staff apprised of the upcoming mid-year evaluation process and available resources.

Staff will be at the Committee and Board meetings to answer any questions.