










ETF Scorecard FY2024 Q2 (October 1, 2023 -December 31, 2023)

GOAL	MEASUREMENT	NORTH STAR TARGET	CURRENT FISCAL YEAR TARGET	CURRENT PERIOD ACTUAL	PREVIOUS PERIOD ACTUAL	STATUS  = On Target  = At Risk  = Significantly	NOTES Indicate dependencies on other metrics or initiatives, reporting frequency (i.e.: monthly, quarterly) along with any changes or issues impacting outcomes
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 Customer Experience Feedback = customer perspective/service rating	92.00%	87.00%	88%	88%	On Target	The Customer Experience (CX) Feedback Score for FY24 Q2 remained at 88%. It's worth noting: <ul style="list-style-type: none"> • 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 8 points higher than the same quarter in the previous fiscal year. • The ETF website user satisfaction score (aka, NSAT) increased by 8 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.
	Average Wait Time Service Level Agreement Score of identified transactions Average Wait Time Score = operations/ service delivery time	4 for all trxn	4 for HVHI trxn	4.0	4.1	On Target	The Average Wait Time Score remains the same as the previous quarter. In past reports, there were two areas that consistently did not meet the standards set for customer service: 1) the average speed of answer for member phone calls and 2) the time it takes for a member to meet with a benefit specialist for a retirement appointment. This quarter, the Call Center charted significant improvement in the average speed of answer due to recently filled positions and cyclical telephone call volume, which is lower than the previous reporting period (1:43 minutes in Q2 as compared to 2:30 minutes in Q1). The member appointment metric is still not meeting goals, however, several vacancies have been filled and additional appointment slots have been added for members.




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Goal 2: Implement outcomes-driven performance management and process management.	Cumulative number of IAS future state processes that have been identified, optimized, and documented with appropriate performance measures and controls in place	96	96	61	37	On Target	During this reporting period, 24 future-state processes were documented, including: <ul style="list-style-type: none"> • 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	100.00%	100.00%	0%	100%	On Target	There were no active annual performance management cycle tasks scheduled for Q2. The project team focused on preparing staff for the upcoming mid-year evaluation process occurring in Q3 by offering various updates and presentations to ETF governance groups, training opportunities for ETF staff, and ETF Community articles.
	Percent of Equity and Inclusion program tasks scheduled to be completed within the quarter that are completed on schedule.	100%	100%	100%	100%	On Target	The ETF Equity and Inclusion Plan FY24-26 was finalized and rolled out to ETF staff in December, and includes the implementation of two action items that will begin in January 2024.

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Goal 4: Implement modern, secure, and resilient information technologies.	Percent of applications in the Invest quadrant of the Gartner TIME model **	60%	29%	29%	28%	On Target	During this reporting period, there were no systems added and one system was retired, the myETF application supporting the legacy Benefit Administration System (BAS) architecture. The entire BAS architecture has been removed from ETF's environment in favor of an "archived" architecture that can be retrieved if needed.
	Percent of Key Risk Indicators that are within established risk thresholds	5 of 5	4 of 5	5 of 5	4 of 5	On Target	During this reporting period, all the servers and computer vulnerabilities that surfaced were successfully patched within threshold timeframes. Also notable is the performance by staff to follow protocols during monthly phishing tests, which are positive signs that ETF's training and risk mitigation efforts are effective.

* New measurements being reported for this period.

** The Gartner T.I.M.E model (Tolerate, Invest, Migrate, Eliminate) is the tool used to evaluate and make decisions about ETF's application portfolio (the collection of IT systems used). Applications are evaluated for their ability to produce value at a reasonable cost, to eliminate low-value systems and increase investment in high-value systems. The higher the % of portfolio within the "Invest" quadrant (N. Star metric) indicates greater overall portfolio value meeting ETF's member and employer needs.

Legend

-  **On target** - Work accomplished meets or exceeds this period's expectations and represents progress at a pace that will achieve the expected year-end results.
-  **At risk** - Expected results for this period have not been met. Performance gaps are not significant enough to impact the expected year-end results.
-  **Significantly off track** - Expected results for this period have not been met. Year-end results will not be achieved without intervention.