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Correspondence Memorandum

Date: September 4, 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 Board action is required.

Attached is the Department of Employee Trust Funds' (ETF's) scorecard for the period ending June 30, 2024. These performance measurements provide the Budget and Operations Committee (Committee) and the Employee Trust Funds Board (Board) an objective way to measure progress toward ETF's four strategic goals and represent the fourth reporting period (Q4) for the FY2024 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 included in this memo.

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:** As compared to the FY2023 Q4 reporting period, this measurement made significant progress to exceed the FY2024 current fiscal year target, with 109 of the targeted 96 future-state processes documented. This achievement is the result of the team being able to finalize the future-state process documentation as the solution was finalized.

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:** This measurement tracks the current phase of ETF's competency-based performance management system, which sets the foundation for hiring, training, leading, and measuring and managing performance for all ETF staff and supervisors. During this reporting period, 99.51% of all employees completed final evaluations timely. The completion rate

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is significant given the performance evaluation cycle is in its second year.

Additional developments supporting the successful integration include:

- The addition of a new competency, “manages complexity,” was successfully implemented as part of the 2023-2024 process.
- The competency roll out was determined for the next performance year.
- The Job Family/Functional Competency page was updated to reflect the new functional competencies.

Communications to prepare staff for their performance evaluations included directly emailing every permanent employee to identify their job family and new functional competencies. In future performance evaluation cycles, these new functional competencies will be tied to business units’ daily work for unit-specific goal setting training.

This memo marks the conclusion of the FY2024 reporting cycle. The December memo will showcase minor changes made to the new FY2025 Scorecard measurements.

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

Attachment A: [ETF Scorecard FY2024 Q4 \(April 1–June 30, 2024\)](#)