



## Secretary's Annual Performance Review 2024-2025

For the Review Period of June 1, 2024 through May 31, 2025

***The Secretary serves as the Department of Employee Trust Funds' (ETF) chief executive officer and is responsible for the detailed administration of the agency and oversight of the benefit programs. The Secretary shall perform all duties prescribed by state statute or delegated by the ETF Board. The Secretary's performance review is conducted annually at the June ETF Board meeting.***

### **Directions:**

**Each Board member should rate the Secretary's annual performance by clicking the button next to the appropriate rating for each performance criteria. Individual evaluations will be collected by the ETF Human Resources Director and compiled into a final performance evaluation summary for review by the Executive Committee. Each Board member may provide remarks in the "Comments" box below each section. Please complete the evaluation by no later than May 30, 2025.**

**This review will rate the following performance criteria:**

- **Board Relations**
- **Management of Operations**
- **Member/Employer Services**
- **External Relations**
- **Leadership**
- **Staff Development**

\* 1. Please select your name.

- ☐ Abler, Mike
- ☐ Easland, Becky
- ☐ Flogel, Jen
- ☐ Ford, William
- ☐ Heller, Chris
- ☐ James, Beau
- ☐ Lounsbury, Katy

- ☐ Miller, Angela
- ☐ Morrin, Karl
- ☐ Nickels, Justin
- ☐ Stanton, Michele
- ☐ Walker Henry, Ingrid
- ☐ Wilding, Steven



## Secretary's Annual Performance Review 2024-2025

### Board Relations

- **maintains environment that promotes positive and professional working relationships with Board members**
- **keeps Board members well informed of relevant issues, trends, system operations, external and internal challenges**
- **responds to Board members' questions, concerns and requests for information in a clear and timely manner**
- **provides assistance to Board committee chairs in the development of Board agendas**
- **assists and supports Board in execution of fiduciary duties**
- **works effectively with the Board in exercising its oversight responsibilities**

\* 2. In regard to Board Relations, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Consistently strives to maintain a good working relationship with Board and to provide Board members with tools necessary for them to carry out their responsibilities.
- ☐ **Accomplished:** Communicates in a satisfactory manner. Keeps Board members adequately informed of issues and activities.
- ☐ **Developing:** Communication with Board is improving. Inconsistent in providing Board with all details.
- ☐ **Needs Improvement:** Communication is lacking. Board members not sufficiently informed of issues and activities.

Comments



## Secretary's Annual Performance Review 2024-2025

### Management of Operations

- **provides for effective day-to-day operations of the Department**
- **manages operations in accordance with all relevant federal and state laws, administrative rules, union contracts, and internal policies**
- **develops reasonable budgets and manages the Department in a cost effective manner**
- **identifies and satisfactorily resolves problems**
- **ensures consistency and stability of operations through a capable and knowledgeable management team**
- **utilizes benchmark studies, surveys and best practices to improve processes and efficiencies**
- **makes audit compliance a priority**
- **exercises prudent use of technology**
- **oversees the security for all official documents and plans for business continuity**

\* 3. In regard to the Management of Operations, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Demonstrates the ability to manage daily operations efficiently and consistently. Utilizes sound management practices and technology to further the Department’s mission. Ensures full audit compliance.
- ☐ **Accomplished:** Manages organization sufficiently to carry out basic mission of the Department. Delegates appropriately. Attempts full audit compliance.
- ☐ **Developing:** Shows potential to effectively manage resources but requires frequent guidance in some aspects of managing daily operations.
- ☐ **Needs Improvement:** Manages operations and resources inconsistently. Does not fully utilize management team. Requires more focus on audit compliance.

Comments



## Secretary's Annual Performance Review 2024-2025

### Member/Employer Services

- **ensures members are educated about benefits and informed of any benefit changes**
- **responds to member concerns in a timely and professional manner**
- **seeks to enhance partnership with employers**
- **seeks to improve communication with members and employers**
- **surveys members and employers about communication and service preferences**

\* 4. Regarding Member/Employer Services, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Consistently works in the best interest of membership. Responds to members and employers in a prompt and professional manner. Fosters good communication between groups.
- ☐ **Accomplished:** Provides members and employers with adequate information. Responds to concerns within an acceptable timeframe and in a professional manner. Allows for open communication between groups.
- ☐ **Developing:** Information sharing with members is improving. Shows potential for improved interactions with members and employers but needs guidance.
- ☐ **Needs Improvement:** Fails to keep members and employers informed. Does not respond to concerns in a timely and/or professional manner.

Comments



## Secretary's Annual Performance Review 2024-2025

### External Relations

- **maintains communication with external entities and stakeholders (legislature, Governor's Office, other government officials, State of Wisconsin Investment Board, and the general public)**
- **maintains awareness of state and national influences that may affect the Department, its benefit programs and the agency's reputation/image**
- **solicits input from associations and interest groups, both state and federal**
- **pursues a legislative agenda that protects members' legal benefit rights and the stability of the benefit programs**
- **monitors and analyzes legislative and regulatory activities**
- **maintains appropriate media relations and serves as chief spokesperson when appropriate**
- **ensures managers and employees understand the importance of ongoing communication with all entities and stakeholders**

\* 5. Regarding External Relations, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Excels at communicating with external parties. Maintains awareness of outside influences. Takes steps necessary to preserve the integrity of the Department and benefit programs.
- ☐ **Accomplished:** Communicates with external parties in a satisfactory manner. Able to effectively develop legislative strategies and respond to legislative initiatives.
- ☐ **Developing:** Inconsistent with communication to external entities. Not always familiar with impact of outside influences. Improving with legislative effectiveness or other areas of external relations.
- ☐ **Needs Improvement:** Communication with external parties is lacking. Does not take initiative in pursuing legislative agenda.

Comments



## Secretary's Annual Performance Review 2024-2025

### Leadership

- **inspires confidence and credibility with the Board, managers, staff and outside stakeholders**
- **utilizes a team approach to strategic planning to set goals and to prepare for future initiatives**
- **provides clear direction to staff and leads organization with a vision**
- **provides for effective and efficient day to day management of Department**
- **rewards excellence and offers a supportive work environment**
- **maintains awareness of industry trends and responds to change**
- **participates in professional organizations for personal and professional development**
- **invites innovative ideas and programs**
- **maintains the integrity of the Department by acting in an open and ethical manner**

\* 6. Regarding Leadership, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Demonstrates the highest degree of leadership by effectively planning for the future, keeping current in the benefits field and providing a stable and effective work environment.
- ☐ **Accomplished:** Leads the organization in a satisfactory manner. Keeps staff informed of activities and projects a positive image of the Department.
- ☐ **Developing:** Gradually improving on communication with staff but needs to work on portraying confidence in preparation of future for organization.
- ☐ **Needs Improvement:** Fails to adequately plan for future activities. Does not provide adequate guidance to employees.

Comments



## Secretary's Annual Performance Review 2024-2025

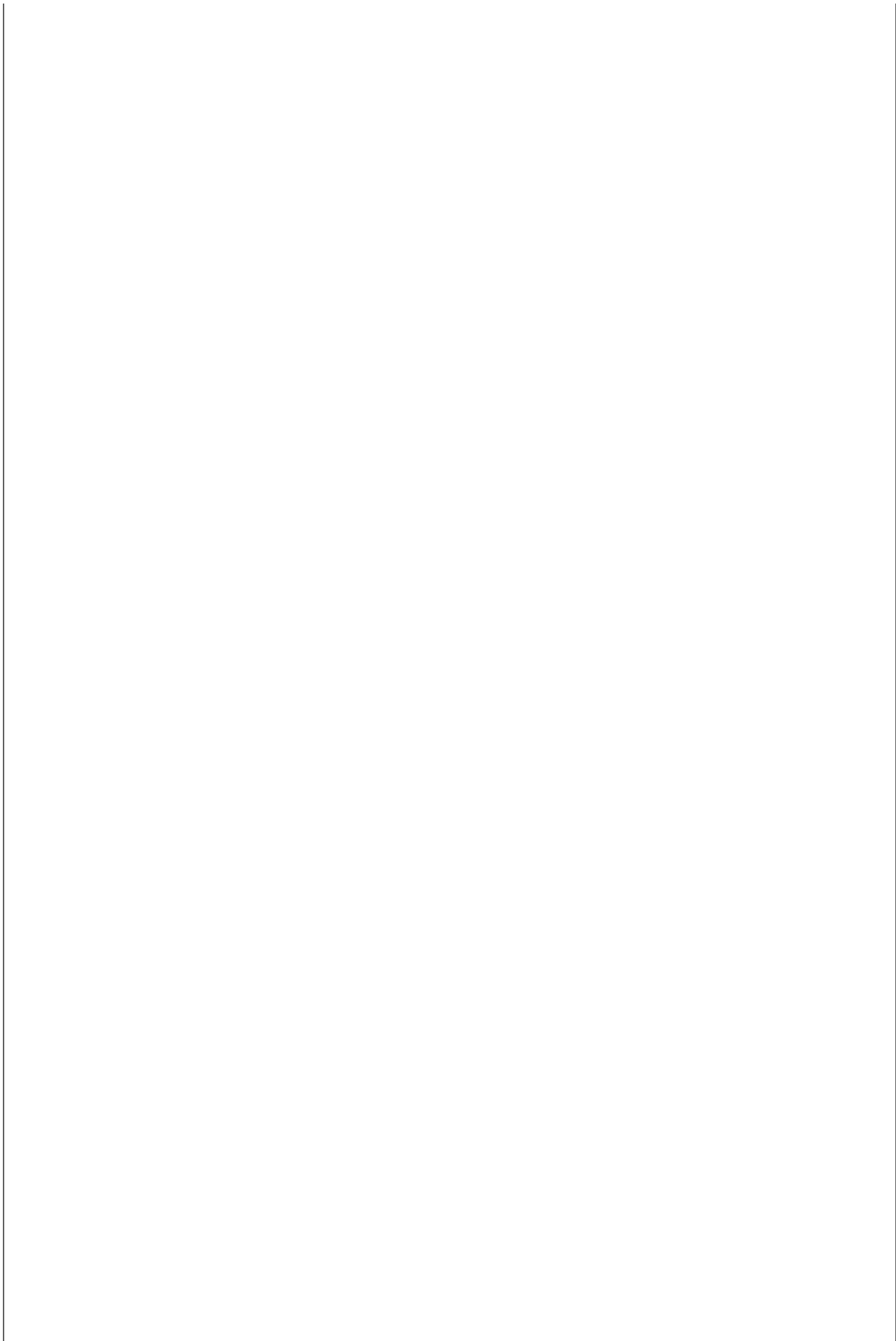
### Staff Development

- **recruits and retains quality staff**
- **creates an atmosphere that fosters teamwork, creativity and participation**
- **works to ensure low turnover by maintaining staff satisfaction**
- **encourages staff training and other opportunities for advancement, growth and skill building**
- **encourages staff teamwork and uses collaborative management style, soliciting staff feedback and involvement in decision making**
- **identifies internal problems and takes appropriate steps to resolve them**
- **keeps employees informed of events, activities and the overall direction of the Department**
- **addresses succession planning for key positions within the Department**
- **encourages diversity within the workforce and consistently follows human resource policies and procedures**

\* 7. In regards to Staff Development, please rate the Secretary based on the information provided above (you may provide remarks in the "Comments" box below).

- ☐ **Exceeds Expectations:** Recognizes importance of trained staff and maintaining employee satisfaction. Ensures staff confidence by responding to concerns and seeking input from all levels.
- ☐ **Accomplished:** Encourages input from employees. Provides training opportunities when possible.
- ☐ **Developing:** Inconsistent in acquiring feedback from employees and providing development opportunities.
- ☐ **Needs Improvement:** Lack of action results in poor morale and productivity. Does not provide incentive for staff development.

Comments





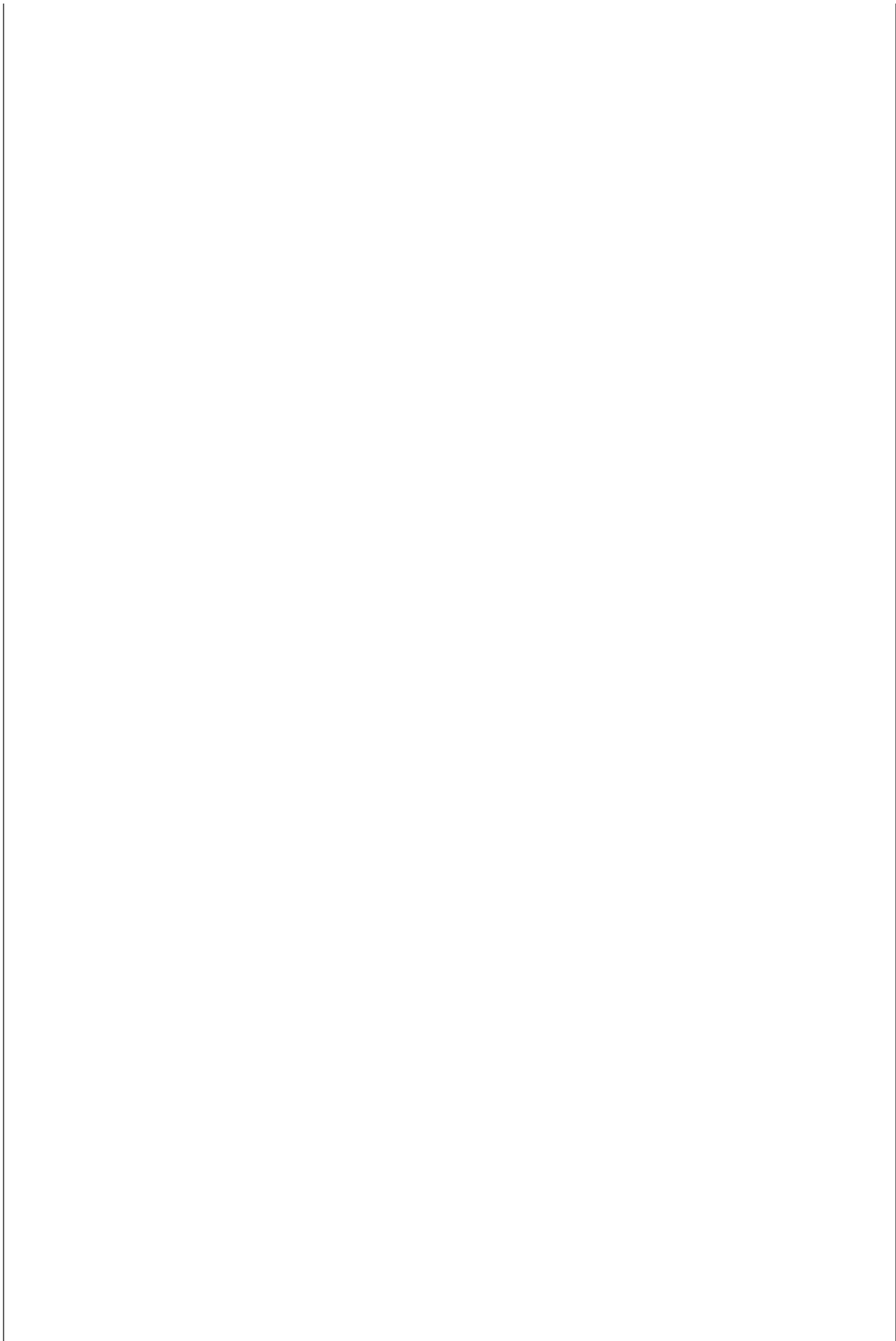
## Secretary's Annual Performance Review 2024-2025

### Comments

#### 8. Achievements

#### 9. Areas Needing Improvements

#### 10. Goals for the Coming Year





## Secretary's Annual Performance Review 2024-2025

### Thank You

**Thank you for taking the time to complete the Secretary's evaluation, your responses and comments are appreciated.**