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Correspondence Memorandum

Date: March 18, 2025

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 December 31, 2024. 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 FY2025 ETF Scorecard. Of the seven measurements for which we have available data, six are on track and one is significantly off track. Highlighted below are the new FY2025 measurements expected to begin reporting this quarter.

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

- **Percent of milestones completed on schedule, as defined in the Initiative Operationalize process management for all IAS-impacted process owners:**
This initiative seeks to optimize Insurance Administration System (IAS) future-state process to leverage new modernization capabilities, versus the past focus on improving management of processes. The initiative supporting this measurement is delayed due to resource constraints and is currently reporting as significantly off track. Work will resume when feasible.

Board	Mtg Date	Item #
BUD	03.27.25	7
ETF	03.27.25	6G

Goal 3: Build a talented and agile workforce.

- **Percent of Insurance Administration System (IAS)-impacted positions indicating their competency level for critical non-technical skills is at least a “Meets,” as determined by the bi-quarterly assessment tool:** Preparation for the operationalization of IAS includes the important work of identifying, prioritizing and preparing those positions most impacted by the new systems and operations in a consistent and repeatable way. This initiative builds upon a standardized framework to:
 - Identify key non-technical skills required in critical IAS-impacted operational positions facing the greatest impact from the implementation of IAS
 - Identify skills needed to ensure post-implementation success for this and future modernization efforts.

ETF is piloting a self-assessment tool, the Digital Dexterity Questionnaire, to identify the competency level for critical non-technical skills of positions most significantly impacted by IAS implementation. Gathering and understanding this data helps ETF to better support staff confidence and preparedness for adapting to the new system. The IAS-impacted positions participating in this pilot include employees and contractors in key business areas, who will complete the Digital Dexterity Questionnaire twice annually.

This measurement is reported during the second and fourth quarters of FY2025, tracking the percentage of those who assess themselves at one of the three highest competency level options. During this first reporting period, 36 of the total 51 participants completed the Digital Dexterity Questionnaire, with 93% of those respondents rated themselves in the three highest options overall. The non-technical skills assessed include:

- Change Management = 87% rated themselves in the 3 highest options
- Problem Solving = 94% rated themselves in the 3 highest options

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

Attachment A: [ETF Scorecard FY2025 Q2 \(October 1 - December 31, 2024\)](#)