ETF's Strategic Plan
Annual Review And Going Forward

Item 4A - Employee Trust Funds Board

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Office of the Secretary

Informational Item Only

No Board action is required.

Agenda

- Review FY25 Strategic Plan Accomplishments
- Introduce ETF’s FY26 Strategic Plan
- Next Steps

ETF Strategic Plan Framework

Goals
- Define our long-term strategic direction

Objectives
- Support goal outcomes

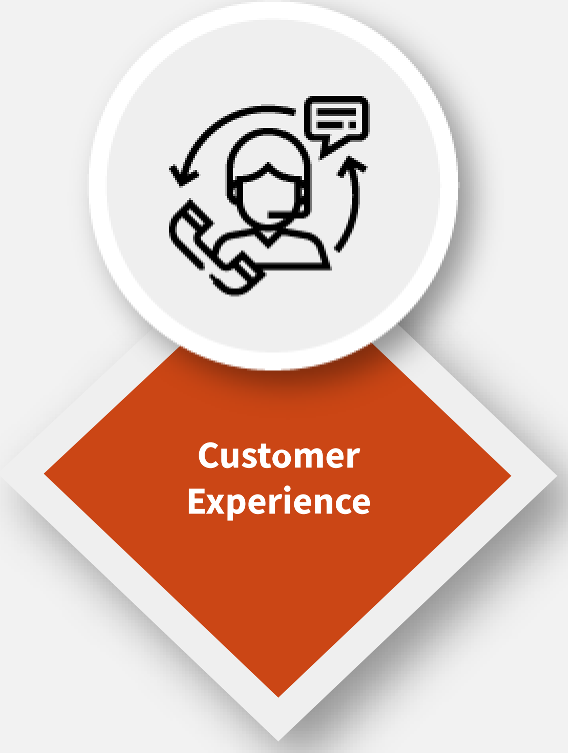
Initiatives
- Span 12-18 months and drive progress of objectives

ETF Scorecard
- Measures progress for achieving goals

ETF Strategic Plan

FY25 Accomplishments

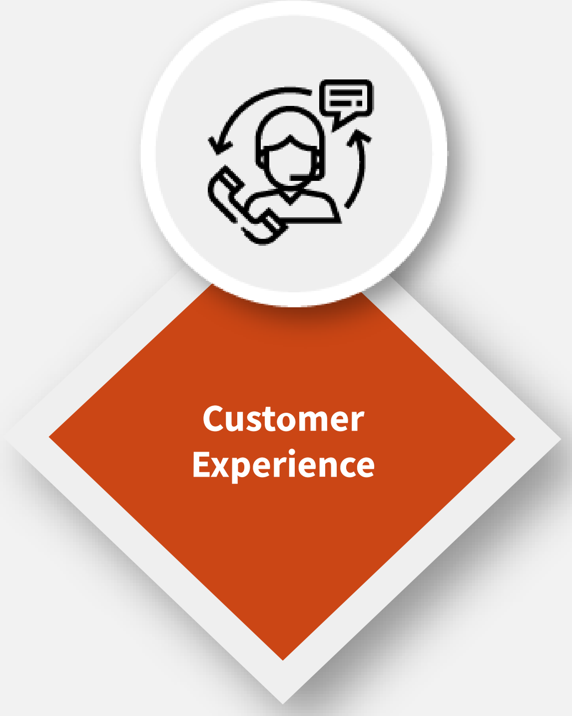
FY 25 Goal 1: Customer Experience Objectives



- Increase employer competency for managing employee benefits
- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements

FY 25 Goal 1: Customer Experience

Accomplishments



- Completed employer training content for My Insurance Benefits (Insurance Administration System)
- Developed employer profiles to better understand the needs of this customer group
  - Segmented by employer size and type

FY 25 Goal 2: Performance & Process Management

Objective

- Optimize processes to leverage capabilities of modernization initiatives

FY 25 Goal 2: Performance & Process Management

Accomplishments

The majority of IAS processes have been defined leveraging best practices where possible within the insurance solution

- Application process is now electronic for active members.
- Proof of eligibility now required when adding a dependent.

FY 25 Goal 3: Talented Workforce

Objectives

- Attract, integrate, and advance top talent
- Advance employee development through meaningful and intentional performance management approaches
- Build the recruitment and retention practices and culture that will make ETF an equitable and inclusive organization

FY 25 Goal 3: Talented Workforce

Accomplishments

- Completed skills assessment framework pilot with positions most impacted by IAS implementation
  - Conducted Digital Dexterity Questionnaire to identify competency level of non-technical skills
  - Developed training and resources to address identified needs
- Implemented numerous recruitment process improvements
  - Reduced hiring timelines by 34%
  - Positive feedback from supervisors on new improvements (phone screens, simplified benchmarks, interview criteria)

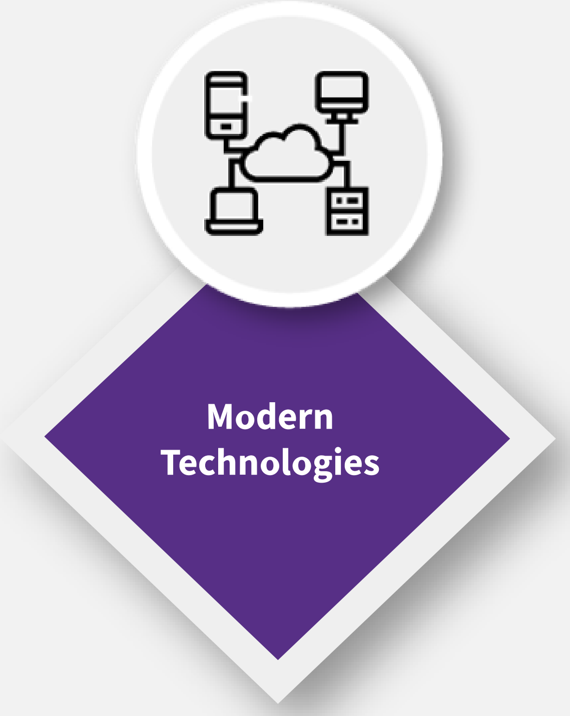
FY 25 Goal 3: Talented Workforce

Accomplishments

- Implemented ETF Equity and Inclusion Plan: FY2024-2026 approved action items
  - Implemented Mentorship Pilot Program
  - Created a Staff Network Group Policy
  - Recommended Stay Interview Pilot Program as optional for supervisors/managers
- Developed a framework and recommendations for implementing a new Office of Enterprise Risk Management (OERM)
  - Developed written recommendations for implementation
  - Completed a survey inventory of ETF's current risk state
  - Awaiting recruitment efforts

FY 25 Goal 4: Modern Technologies

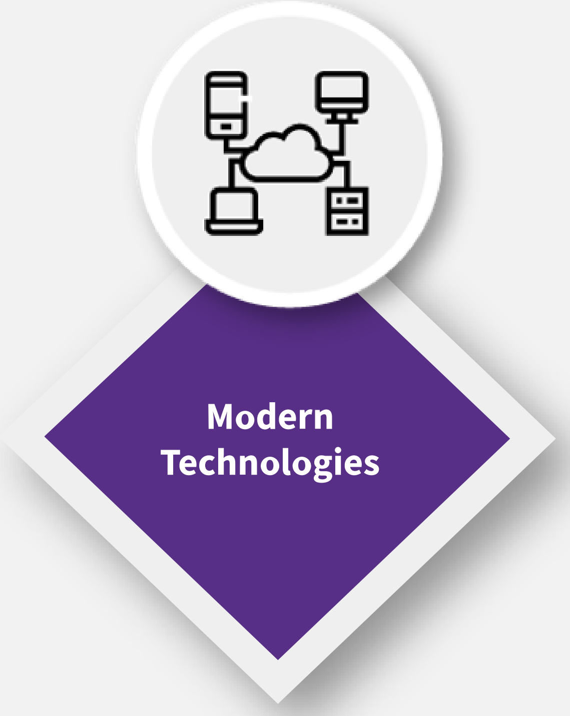
Objectives



- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services
- Integrate systems and processes to support delivery of benefits and services offered by ETF
- Preserve the safety, security and sustainability of all ETF systems and data through standard practices, appropriate security controls, risk management and information security technologies

FY 25 Goal 4: Modern Technologies

Accomplishments



- Insurance Administration System progress
- Published Pension Administration System Request for Proposal and started vendor selection
- Implemented cloud-based Security Operation Center Platform
- Documented a sustainability roadmap ensuring the integrity of ETF’s applications and systems.

FY26 Strategic Plan

FY 26 Strategic Planning Process

Ongoing collaboration between Strategic Council, Agency Management Council and Board of Managers to:

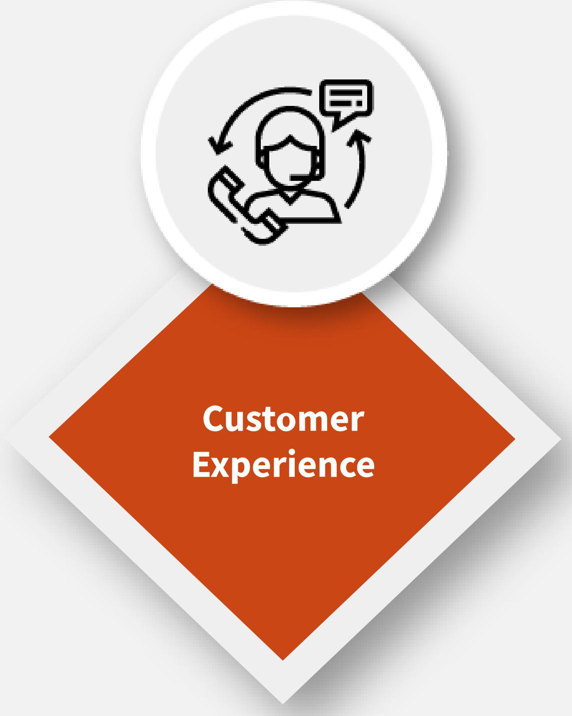
- Broaden operational and strategic insights
- Empower and engage leadership
- Co-author ETF's strategy

FY 26 Strategic Plan: Changes

10 strategic initiatives

- Three continuing from FY2025
- Seven new or new phases of previous initiatives

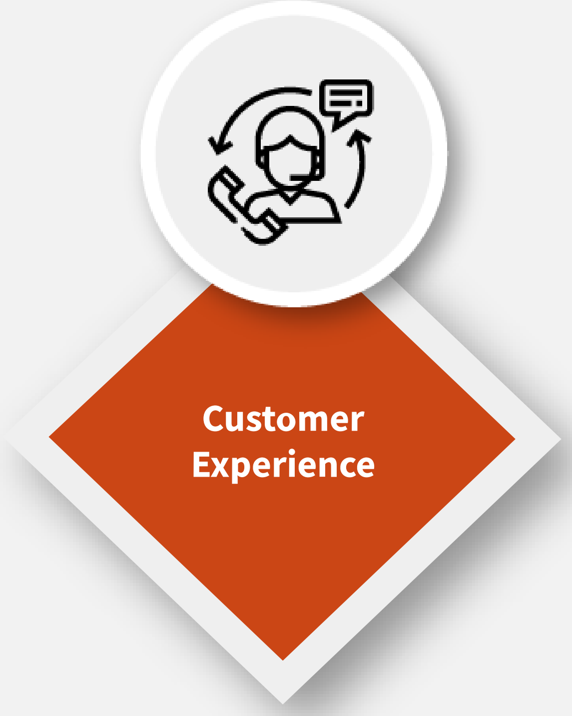
FY 26 Goal 1: Customer Experience
Objectives



- Increase employer competency for managing employee benefits
- Determine the strategy, programs, and organizational infrastructure needed to drive customer experience improvements

FY 26 Goal 1: Customer Experience

Initiative Highlights



Expand persona library to complete inactive member personas

- Gain better insights about segments that are non-vested versus vested and those at minimum retirement age or older
- Create customer journey maps to understand customer segment interactions throughout their journey with ETF

FY 26 Goal 2: Performance & Process Management

Objectives

- Optimize processes to leverage capabilities of modernization initiatives

  ** The initiative supporting this objective has been removed until resources become available.*

FY 26 Goal 3: Talented Workforce

Objectives

- Attract, integrate, and advance top talent
- Advance employee development through meaningful and intentional talent management approaches
- Build the recruitment and retention practices and culture that will make ETF an equitable and inclusive organization

FY 26 Goal 3: Talented Workforce
Initiative Highlights

Analyze results of the Skills Assessment Framework pilot

- Explore tools, technology and resources obtained from pilot effort
- Recommend expansion of skills frameworks and tools

Build a comprehensive multi-focused leadership development program

- Empower supervisors to lead with lasting impact
- 14-month hybrid cohort, beginning in October 2025

FY 26 Goal 3: Talented Workforce

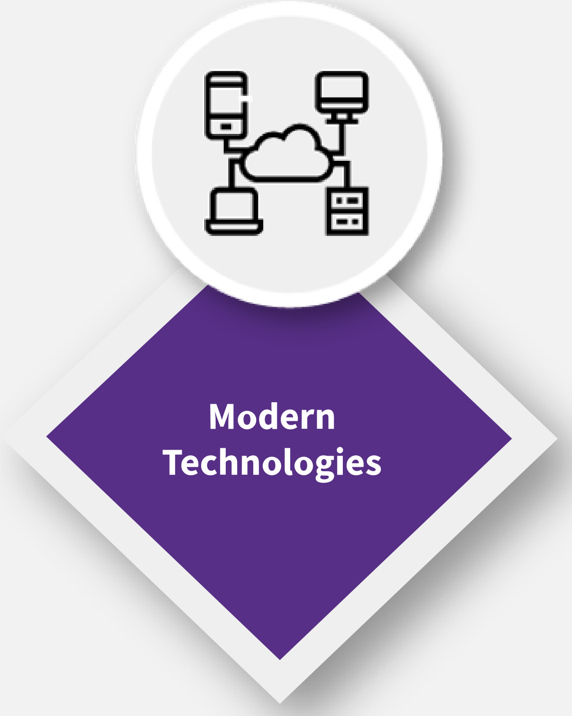
Initiative Highlights

ETF Equity and Inclusion Plan

- Complete Mentorship Pilot Program
- Auditing Staffing Process with E&I lens

FY 26 Goal 4: Modern Technologies

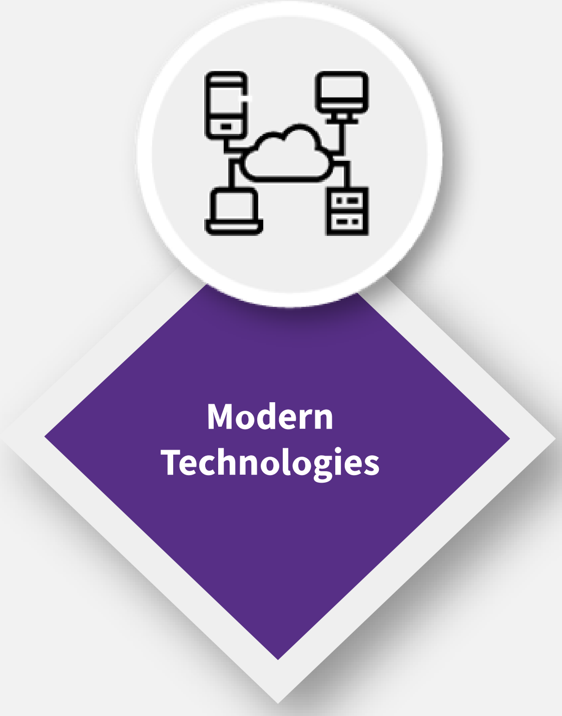
Objectives



- Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.
- Integrate systems and processes to support delivery of benefits and services offered by ETF.
- Preserve the safety, security and sustainability of all ETF systems and data through standard practices, appropriate security controls, risk management, and information security technologies.

FY 26 Goal 4: Modern Technologies

Initiative Highlights

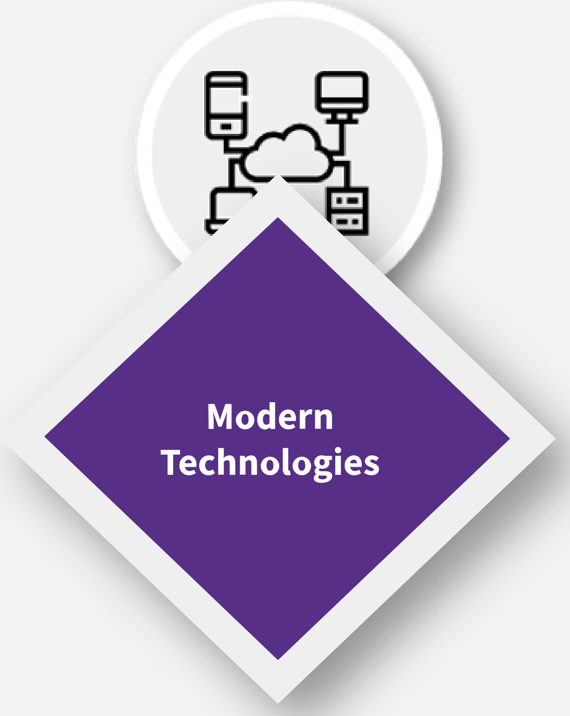


Develop and deploy solutions to support an effortless customer experience that enables accurate self-service and timely benefit administration services.

- Insurance Administration System efforts focused on full program implementation by July 2026, and ongoing efforts for successful user experience
- Pension Administration System efforts focused on finalizing proof of concept and vendor negotiations, and preparedness efforts for implementation

FY 26 Goal 4: Modern Technologies

Initiative highlights (New)

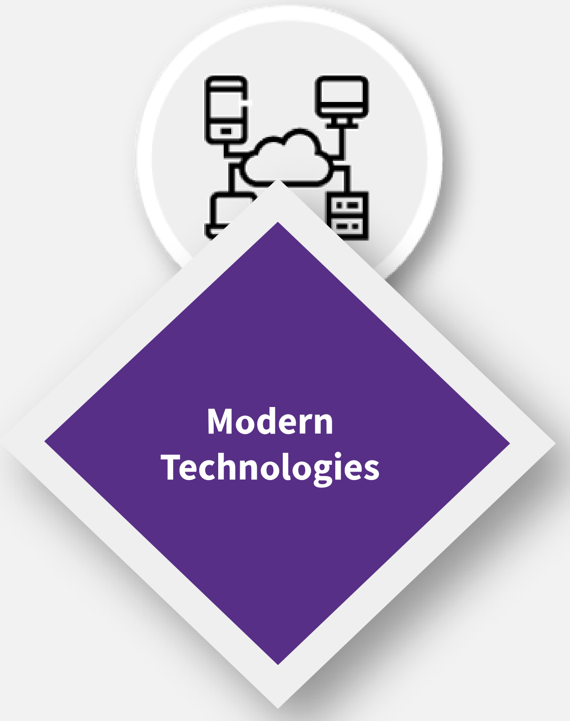


Integrate systems and processes to support delivery of benefits and services offered by ETF

- Identify potential pilot opportunities for using Artificial Intelligence (AI) applications
- Finalize governance and approval process for AI use

FY 26 Goal 4: Modern Technologies

Initiative highlights (New)



Preserve the safety, security and sustainability of all ETF systems and data through standard practices, appropriate security controls, risk management, and information security technologies.

- Improve protection of HIPAA data
- Implement roadmap to ensure sustainability of ETF’s applications and systems

Next Steps: Resource Prioritization

Ensure alignment of resources to priorities

Continue refining data for reporting and decision-making

Next Steps: Governance

Focus: continuing to strengthen and mature governance processes

Strategic Council	Agency Management Council	Data Governance Council	Portfolio Committee
• Setting the agency's strategic direction and defining priorities	• Enhancing alignment of business operations • Collaborating to improve agency performance • Approving agency policies	• Oversight of the agency's data lifecycle from creation, use, storage, and confidentiality	• Resource prioritization oversight • Recommendations for project alignment


Questions?

Thank you

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ETF E-mail Updates

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