STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

801 W Badger Road
PO Box 7931
Madison WI 53707-7931

1-877-533-5020 (toll free)
Fax (608) 267-4549
http://etf.wi.gov

EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
JUNE 2012

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from January through April 2012. These accomplishments are linked to the objectives identified in ETF's strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Created a new tax calculator to allow retirees to determine the amount of taxes they want withheld from their monthly annuity check, based on the number of IRS deductions. In its first week, the calculator was used 3,035 times. We expect this new tool will reduce the number of phone calls from members seeking this kind of information. We also expect reductions in staff time needed to scan paper tax withholding change requests now that members can electronically submit these forms.
- Changed the health insurance system to allow employers to select "Retirement" as an employee termination reason. The retirement termination reason will automatically (based on certain conditions being met) cancel the contract under the employer and set up a new contract using a temporary sick leave account group number to allow time for the preparation by the employer and processing by ETF staff of sick leave certifications without a gap in health insurance coverage.
- Released a Request for Proposals (RFP) seeking a strategic partner to, among other things, help ETF write an RFP to select a software vendor to transform, integrate, and modernize ETF processes and systems. This effort will support a significant, planned expansion of the self-service tools and capabilities as outlined in the ETF's strategic plan.
- Completed a comprehensive inventory of ETF's website, including the removal of redundant, outdated, or trivial information. Website content management is an important part of the larger project involving the development of a new ETF website.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Streamlined the process for how email is responded to/ from our specialists to our members. The process now is more efficient. In addition, members will recognize

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Signature ______ Date 6-4-12

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that the response to their inquiry is from ETF, rather than an individual ETF staff member, whose name they will not recognize.

- Implemented a brief Office of Communications and Legislation (OCL) survey among certain stakeholder groups to gather feedback about ETF's website and newsletters as well as basic information about members' use of social media.
- Launched a dedicated e-mail inbox (WRSNews@ETF.state.wi.us), so that readers of the *WRS News* can provide constructive comments directly to OCL.
- Created new and revised existing informational materials targeting specific member groups. Efforts included: a letter to retirees explaining the annuity adjustments; a video about employee contributions and Wisconsin Retirement System (WRS) investments; updated materials for active employees considering retirement; various announcements promoting new online tools, such as the tax withholding calculator and the Social Security Administration's online tool for requesting statements.
- Utilized the ETF's email notification service, called "ETF Email Updates", nearly fifty times over the course of four months to communicate with members and employers about important WRS topics. These included: effective rate and annuity adjustment announcements, benefit presentations, CEM benchmarking results, employer annual reporting, *It's Your Choice* dates and materials, and much more. Currently, there are nearly 20,000 subscribers to ETF Email Updates.
- Developed an interactive online training module designed for employers to assist in completing the s. 40.63 Disability Employer Statement.
- Designed a more customer friendly, brochure for the Long Term Disability Insurance (LTDI) program. The old, more detailed LTDI brochure was revised as a reference guide for ETF staff and employers.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Obtained a grant to offer ETF employees a "Financial Fitness Challenge", an online financial literacy tool. The training offers five hours of retirement education (one hour a week for five weeks) focused on such issues as saving, investing and retirement planning, and includes pre- and post-tests to measure changes in knowledge.
- Trained all web application programmers in the use of the Struts programming tool and on how to ensure that computer applications are designed with ease of use in mind.
- Offered ETF staff 34 internal training sessions attended by a total of 426 employees and managers. Topics for internal training events included:
    - Project management series
    - Departmental project manager certification program
    - New employee orientation
    - Retirement programs
    - Financial literacy
    - IT/technical systems training
    - Desktop software

    - System product demos
    - Stress management
    - Team leadership
- Attended a Certified Information Systems Security Professional boot camp to receive certification for ETF's Security Officer to provide broad security knowledge to increase our ability to secure systems and infrastructure.
- Attended Web Application Penetration Testing and Ethical Hacking training to help position ETF to proactively test web applications for vulnerabilities.
- Sent representatives to the State and Local Government Benefit Administrators annual conference.
- Sent representatives to the Cost Effective Measurement peer conference to learn how other pension systems are utilizing business intelligence metrics to better manage productivity.

MISCELLANEOUS

- Created Multiple Program Options for Local Employers to allow local employers participating in the group health insurance program to have more than one health insurance program option so they can fulfill their obligations under certain collective bargaining agreements as a result of Act 10.
- Completed the category change process for 94% of WRS employers. The category change process is the process used to determine when the WRS benefit changes made by 2011 Wisconsin Acts 10 and 32 go into effect for each WRS active employee. Acts 10 and 32 changed WRS benefits in the middle of 2011; ETF and WRS employers needed a mechanism to determine when those changes apply, as the benefit changes apply to pay periods, which vary between employers.
- Modified our business process to allow the annual reconciliation process for WRS employers to begin even though the category change process is not yet completed for all employers. This change in process allows for much more efficient use of staff. The annual reconciliation process is used to reconcile employee hours and earnings with contribution remittances. ETF cannot start the process for an employer until that employer completes the aforementioned category changes. As of the writing of this report, 52% of employers submitted their annual reports and processing had been completed for 24% of employers.
- Completed the testing and implementation of system changes needed to calculate retirement benefit estimates to reflect the provisions of 2011 Wisconsin Act 10.
- Implemented a change involving the scanning and indexing of health insurance-related forms, speeding up processing time and equally important, reducing staff wait times for accessing the forms on the imaging system.
- Completed a project to improve application development processes, procedures, guidelines, and standards. This new methodology promotes the use of industry best-practices that will lead to higher quality, more flexible and supported applications, resulting in better member and employer services and cost efficiencies.
- Developed proposed benefit changes for 2013 health insurance program.