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**Department of Employee Trust Funds**  
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**EXECUTIVE COMMITTEE**  
**QUARTERLY ACCOMPLISHMENT REPORT**  
**SEPTEMBER 2012**

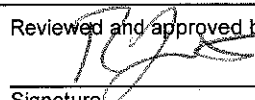
This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from May through August 2012. These accomplishments are linked to the objectives identified in ETF's strategic business plan.

**OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS**

- Created and launched a secure website tool that allows members to request a retirement estimate/application online. This new feature creates a quicker, easier and more convenient way for members to request an official retirement estimate/application. It also created many efficiencies for ETF as well, including reducing the number of follow-up contacts to correct/verify data and elimination of paper-based, labor-intensive aspects of producing the estimate/application.
- Launched the project to implement the web-based Accumulated Sick Leave Conversion Credit (ASLCC) System. The new and improved system, which will be a web-based application, will allow state employers to electronically submit sick leave certifications for employees who terminate employment. In addition, members will be able to view their monthly sick leave account balance on MyETFBenefits.
- Negotiated and signed a contract with a strategic partner, LRWL (Leon Wechsler), to help ETF plan, develop, and execute multiple efforts related to the agency-wide TIM effort (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 ETF's strategic plan.

**EXPAND OUTREACH TO MEMBERS AND EMPLOYERS**

- ETF announced the autumn schedule of member public presentations that we will be conducting throughout the state. In addition, ETF announced the autumn schedule for employer training courses that are also offered at various locations throughout the state.
- Changed the primary web domain name for ETF e-mail addresses to [etf.wi.gov](mailto:etf.wi.gov) from the previous domain name of [etf.state.wi.us](mailto:etf.state.wi.us). This change conforms to state government standards and makes it easier for our customers to have a common extension to e-mail ETF staff.

Reviewed and approved by Robert Marchant, Deputy Secretary

Signature _____
Date <u>9-6-12</u>

Board	Mtg Date	Item #
EXC	9.19.12	3A

## **STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM**

- Offered ETF staff a total of 38 internal training sessions attended by a total of 659 employees and managers. Internal training events included:
  - Project management (PM) series
  - Departmental project manager (DPM) certification program
  - Benefit and IT systems
  - Virtual meeting software
  - Fiscal system
  - WRS Study
  - Retirement programs
  - Leadership institute
  - Respectful workplace
  - Career development
  - Financial literacy
  - Training skills
  - Administrative rules
  - CPR/AED certification
- Sent several managers to obtain certification in the Certificate of Achievement in Public Plan Policy (CAPPP) program for retirement programs.
- Completed a skills self-assessment survey among ETF staff to identify areas of knowledge or expertise employees possess or are interested in acquiring to assist in TIM efforts.
- Completed the Donuts @ Dawn sessions, in which 10 supervisors discussed leadership and other topics with the Secretary's Office.
- Offered to employees the "Financial Fitness Challenge," an online, five-week/five-hour retirement financial education course. Approximately 90 staff worked to complete the program.

## **MISCELLANEOUS**

- Completed the reconciliation of 2011 hours, earnings, and contributions for all WRS employers and active employees. The reconciliation process is usually completed in March each year, but the 2011 reconciliation process was much different and more complex, due to law changes. These changes included implementing mass employee category changes mid-year and extensive contacts with employers regarding the effect of the legislation on employee benefits and employer reporting procedures.
- Completed the second phase of modifications to our insurance computer systems to automatically provide state retirees with health insurance coverage for the 30-90 day period during which their sick leave certification is being processed.
- Piloted the use of computers or tablets with four ETF Board members at the June meeting to determine feasibility of having paperless board meetings.