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**EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
DECEMBER 2012**

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

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Gathered requirements for a Request for Proposals (RFP) for the new Benefits Administration System (BAS). Effort included more than 1,000 hours of staff meetings to validate, update and clarify several thousand requirements across more than 40 functional areas. These functional area topics included but were not limited to such business and technical items as annual statements, audit and security, benefit estimates, workflow, business rules, content management, deferred compensation and the customer service call center.
- Created, released and scored an RFP for the selection of a "data integrity" vendor to assist the Department in classifying, organizing and ultimately cleansing and migrating more than 50 years-worth of data into the future BAS. This multi-phase effort will help ensure that data is appropriately organized and that knowledge is transferred, which is important to the success of data governance, data integrity and other data security-related efforts.
- Planned rollout of new web-based Accumulated Sick Leave Conversion Credit application in November. This replaces the existing mainframe with its limited functionality and manual processes. The new application allows direct (online) employer certification of sick leave credits and account inquiry activities and automates many tasks for ETF staff.
- Deployed a project to facilitate Wisconsin Act 133, which allows local governmental employers who do not participate in the Wisconsin Retirement System (WRS) to offer employees a health care coverage plan through the Wisconsin Public Employees (WPE) program offered by the Group Insurance Board.

Reviewed and approved by Robert J. Marchant, Deputy Secretary


Signature _____ Date 11/20/12

Board	Mtg Date	Item #
EXC	12.6.12	3A

QUARTERLY ACCOMPLISHMENT REPORT

December 2012

Page 2

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Communicated with employers and affected members about the details of the federal Fallen Heroes Survivor Benefits Fairness Act of 2001. A WRS annuity paid to the survivor of a public safety officer killed in the line of duty may be eligible for an income tax exemption under the federal Taxpayer Relief Act of 1997 and the Fallen Hero Survivor Benefit Fairness Act of 2001 (FHSBFA). This exemption applies to both federal and state income taxes.
- From an outreach perspective, completed one of the busiest periods of the year. Outreach staff traveled to 27 cities across the state, providing 64 small group retirement sessions serving 642 members; 12 “field” presentations reaching 1,111 members; and staffed booths at 23 WRS benefits fairs.
- Conducted 23 training sessions for employers. Training topics included but were not limited to: 2011 Wisconsin Acts 10/32 changes, eligibility determination, rehired annuitants, reportable earnings, annual reconciliation, USERRA and military service crediting. Sessions were held in Madison, Milwaukee, Appleton, La Crosse, WI Dells, Eau Claire, Hudson, Rice Lake, and Rhinelander.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Completed a strategic staffing plan to ensure ETF’s internal IT organization is well prepared to support the projects of the Transformation, Integration and Modernization (TIM) initiative. The plan identifies IT service area strengths and weaknesses and action plans to address areas needing improvement.
- Hired a change management consultant to undertake a Department-wide “readiness assessment” for the TIM initiative. The effort helped identify important overall strategies for effective change management and identify areas needing extra emphasis and support.
- Provided two optional, off-site training sessions (“The Big Learning Event”), which were attended by about 80% of employees. The interactive training focused on the concept of organizational process improvement. This session was developed based on an “Extreme Government Makeover” presentation previously offered to ETF leadership and training staff.
- Offered employees 24 other training opportunities this quarter, attracting more than 400 attendees. Topics/events included: project management, Department Project Manager (DPM) certification program, business intelligence, specialized human resources topics, business analysis, IT systems and an overview of the Wisconsin Retirement System and the State of Wisconsin Investment Board.
- Conducted “Lunchtime Leadership Labs” for supervisors. Topics of discussion centered on leadership and agency vision.

QUARTERLY ACCOMPLISHMENT REPORT

December 2012

Page 3

- Completed the first stage of the inaugural DPM certification program, which offers employees the opportunity to formally acquire project management skills and knowledge and the potential to earn project manager certification. Expanding the number of trained project managers via this in-house training opportunity will help facilitate planning and completion of the growing number of projects within ETF.
- Developed a process for implementing a collective and systematic knowledge management tool for the desktop. This searchable knowledge base will improve staff access to information and assist in providing accurate, consistent information to all members and employers. The ability to quickly find documents and answers to questions will increase efficiency and assist with in-house professional development/education efforts.

MISCELLANEOUS

- Completed 2011 annual processing, including implementing changes to IT systems required by Act 10.
- Implemented two new security systems to better detect security intrusions.
- Added wireless networks to ETF's two buildings for use of mobile computing devices including notebooks, tablets, and smart phones by staff, consultants, and Boards.
- Moved and reconfigured several work units within and between Rimrock and Badger Road buildings to realign functions and staff more appropriately and accommodate additional space needs.
- Created a new application for "on-demand" printing duplicate copies of members' annual Statement of Benefits. The change was implemented for more efficient (and in-house) processing of requests, faster turnaround time, and increased member satisfaction.
- Continued the implementation of 2011 Wisconsin Acts 10 and 32, including completion of the "post and roll" process for 2011 which, among other things, allowed ETF to close transactions for 2011 calendar year and apply interest to WRS member accounts.
- Produced and distributed the annual *Statement of Benefits* to more than 360,000 members.