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EXECUTIVE COMMITTEE ACCOMPLISHMENTS REPORT 2012 YEAR IN REVIEW

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments achieved in 2012. These accomplishments are linked to the objective identified in ETF's strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Created the Office of Enterprise Initiatives to direct and coordinate all enterprise activities, including the development of a new Benefits Administration System (BAS).
- Established an overarching strategic vision by creating and branding TIM (Transformation, Integration and Modernization) as the umbrella project over numerous other activities.
- Via the Request for Proposal (RFP) process, selected a strategic partner, LWRL, to help ETF select and implement new technology tools that support its mission and strategic goals, including those that lead to a significant, planned expansion of the self-service tools and capabilities as outlined in the ETF's strategic plan.
- Via the RFP process, selected a vendor, ICON Integration & Design, to provide ETF with data integrity services. The plan is to ensure the accuracy and consistency of our data across our many stand-alone applications to better ensure success when implementing a new BAS over the next several years.
- Gathered functional requirements for the BAS and compiled them into an RFP framework.
- Created and launched a new online tax calculator to allow retirees to determine the amount of taxes they want withheld from their monthly annuity checks, based on the number of IRS deductions. In its first week, the calculator was used more than three thousand times. This new tool should reduce the number of phone calls from members seeking staff assistance and create efficiencies in processing tax withholding request forms.
- 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, including reducing the number of follow-up contacts and eliminating various labor-intensive aspects of producing the estimate/application.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed 2/13/13

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EXC	3.7.13	4A

- Replaced the old mainframe-based Accumulated Sick Leave Conversion Credit application, which had limited functionality and many manual processes, with a new web-based application. The new application allows direct employer certification of sick leave credits and account inquiry and automates tasks for ETF staff.
- Changed the health insurance system to allow employers to select "Retirement" as an employee termination reason. The retirement reason will automatically (based on certain conditions being met) cancel the health insurance contract under the employer and set up a new contract using a temporary sick leave account group number for the 30-90 day period during which their sick leave certification is being processed, without a gap in health insurance coverage.
- Developed an interactive online training module designed to help employers complete the s. 40.63 Disability Employer Statement. This will be a model for developing more online employer training modules.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- 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.
- 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," 175 times over the course of 12 months to communicate with members, employers and interested parties 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 board meetings and agendas. Currently, there are more than 25,000 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.
- Split the positions of Communications Director and Legislative Liaison to allow for more focused communication efforts.

STRENGTHEN INTERNAL WORKFORCE TRAINING

- Earned a "Gold Award" for employee participation and completion in the "Financial Fitness Challenge," an online, five-week/five-hour retirement financial education course. ETF obtained a grant to offer the program to employees; approximately 90 worked to complete the program.
- Offered ETF staff 96 internal training sessions attended by a total of 1,485 employees and managers. Topics for internal training events included: a project management series; a Departmental project manager certification program; new employee orientation; WRS benefit programs; financial literacy; IT/technical systems

training; desktop software; team leadership; virtual meeting software; leadership institute; career development; and business intelligence.
- Completed the Donuts @ Dawn and Lunchtime Leadership Lab sessions, in which 18 supervisors discussed leadership and other topics with the Secretary and Deputy Secretary.
- 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.
- 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.
- 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.

MISCELLANEOUS
- Continued the use and expansion of the Project Management Office (PMO) in support of all projects – technical as well as business. The PMO has also provided ETF a means of tracking its portfolio of projects to ensure appropriate resource allocation.
- 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.
- Deployed a project to facilitate Wisconsin Act 133, which allows local government employers who do not participate in the WRS to offer employees a health care coverage plan through the Wisconsin Public Employees (WPE) program offered by the Group Insurance Board. As of January 1, 2013, one non-WRS employer has joined the program, and a second has filed a resolution to enroll effective April 1, 2013.
- Implemented the federal Fallen Heroes Survivor Benefits Fairness Act of 2001. A Wisconsin Retirement System (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. Sent a communication to employers explaining their role in the process and also sent a letter directly to the survivors who may be eligible.

- Began planning for the implementation of a new Financial Management Information System (FMIS) to support the Office of Budget and Trust Finance's complex reporting and accounting needs. An RFP for implementation services is scheduled to go out in February 2013 with an expectation that the financial system will be largely implemented by the end of 2013.
- 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.
- Converted and scanned Board Meeting materials (a total of 81,100 paper and fiche) from 1911-2001 to electronic images for viewing by staff and to ensure disaster recovery of documents.
- Handled 10,030 health insurance changes during the It's Your Choice health insurance open enrollment period, which has happened only once before in the history of the group health insurance program. More than 1,300 public employees elected to enroll in the group health insurance program for 2013, up from under 600 in 2012.