



STATE OF WISCONSIN
Department of Employee Trust Funds
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EXECUTIVE COMMITTEE
QUARTERLY ACCOMPLISHMENT REPORT
JUNE 2013

This report highlights Department of Employee Trust Funds (ETF) accomplishments that occurred from January through April 2013. These accomplishments are linked to the objectives identified in ETF's strategic business plan.

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Updated ETF's Telephone Message Center service. This benefits our Wisconsin Retirement System (WRS) members and employers by providing them access to important current topics of interest while also improving customer service.
- Implemented one contact telephone number for employers by re-directing ETF's Employer Communication phone number to the main telephone number. This process improvement brings the Department a step closer to one contact phone number for all customers.
- Automated processing of updates to Long-Term Disability Insurance from the vendor into ETF systems. Eliminating this labor-intensive manual process, saved more than two weeks of staff time and resources each year.
- Automated the twice-annual process of updating life insurance premiums from the vendor into ETF systems, which includes automatically generating new insurance certificates for members. This improvement is expected to save more than 1,000 hours of ETF staff time in 2013 alone.
- Continued to compile business requirements for the Benefit Administration System (BAS) Request for Proposal (RFP). The document is scheduled to be published in early June.
- Launched Phase 2 of the Accumulated Sick Leave Conversion Credit Program application (AcSL), initially involving two large employers. Phase 2 allows employers to submit sick leave certificates electronically. Currently, employers must fax or mail the certificate to ETF for entry into the system. Phase 2 will be rolled out to all state employers after completion of this pilot.
- Implemented viewer online surveys, now offered at the end of updated and new online videos for members and employers.
- Upgraded online video technology to offer enhanced functionality and viewing on such mobile devices as iPad, iPhone, iPod, Android, and others.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed XX/XX/13

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EXC	6.19.13	4A

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Mailed to retirees a special letter describing this year's negative Core annuity adjustment and included information on the completion of the five-year smoothing of 2008 investment losses. The letter was timed so that it was received prior to the distribution of the individualized "annuity mailers."
- Added a new feature in the *WRS News* and on the Department's website about WRS-related legislative issues and the status of the 2013-2015 state budget.
- Wrote and published an informational article on the positive economic effects of the WRS on the state's economy in publications of the Wisconsin Counties Association and League of Wisconsin Municipalities.
- Began offering a series of webinars (live, online presentations) using "Go-to-Webinar" on a variety of topics, including annual adjustments, the annual Statement of Benefits, annuity options and additional contributions. Sessions were offered during various times of the day to accommodate members' varying schedules.
- Mailed revised and improved annual sick leave statements to eligible members. The statements show account balances and projections related to how long the credits can be used to provide health insurance coverage.
- Launched a new telephone customer satisfaction survey for members who contact ETF's Call Center.
- Offered numerous training opportunities for employers across the state. The trainings give employers an understanding of their reporting responsibilities to ETF.
- Conducted 61 small group retirement sessions throughout the state, serving 450 members and 12 private/public presentations, serving 1,225 members.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Offered to ETF staff a total of 20 training sessions, attended by 258 managers and employees. Internal training events included:
 - Employee Assistance Program – LifeMatters EAP (for both supervisors and non-supervisors)
 - "TIM (Transformation, Integration, and Modernization) Talk" with Bob Martin
 - AcSL (Accumulated Sick Leave) Training
 - Project Management: Phases – Project Planning, Project Completion
 - Advance Care Planning
 - Project Sponsor Training
 - Personal Computing Security Training
 - Unconscious Bias Training
 - Addressing Customer Service
 - Part 1 (of 3) two-day sessions for employees and Board members on Retirement Plan Basics conducted by International Foundation on Retirement Education (InFRE)

- *Public Attitudes Towards Retirement*, presented by Diane Oakley, executive director of the National Institute on Retirement Security
- Redesigned the employee intranet site home page to make it more visually interesting, interactive, and easier to access job-related tools and information.
- Completed quarterly small-group staff meetings with the Secretary and Deputy Secretary, ensuring every staff member has the opportunity to raise concerns and provide feedback.

OTHER ACCOMPLISHMENTS

- Continued the Enterprise Business Model (EBM) efforts to document all ETF business processes via scenario building. The final EBM documentation will be included in the BAS RFP and should assist ETF and its partners in developing and implementing the new BAS.
- Issued an RFP, evaluated the responses and began selection process for a vendor to assist in the implementation of a new Financial Management Information System (FMIS).
- Launched the Data Integrity Project. Currently moving forward with determining important milestones/deliverables, including completion of a data inventory; data classifying and profiling (categorizing); and identifying the “authoritative source” (most accurate), etc.
- Processed more than 10,000 late reported earnings reports submitted by employers over the course of 2010, 2011 and 2012. A backlog was created due to the implementation of law changes affecting the WRS. The 10,000 late reported earnings were processed in time for the adjustments to show on employees’ 2012 annual *Statement of Benefits*.
- Completed the 2012 annual reconciliation process, mandatory precursor to updating yearly member account balances and the creating the annual *Statement of Benefits*. The reconciliation process matches employer monthly remittances with employee earnings.
- Produced and distributed the January 1, 2013 annual *Statement of Benefits* to 368,826 active and inactive participants and alternate payees.
- Mailed to retirees more than 170,000 “annuity mailers,” which provided detailed information on the effects of the Core and Variable Fund annual annuity adjustments on individual annuities. Modified to make them easier to read and understand.
- Published two editions of the member newsletter, *WRS News*, providing relevant and timely information about WRS benefits and investments managed by the State of Wisconsin Investment Board.
- Continued implementation of the 2011 Wisconsin Act 10 and 32 provisions.
- Piloted an evening Wisconsin Deferred Compensation (WDC) presentation that included general information on retirement and the WDC as a savings option.
- Drafted, released and reviewed responses to an RFP for a new FDIC-Insured Investment option for the WDC program.