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
SEPTEMBER 2013

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

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Completed and issued the Benefit Administration System Request for Proposal (RFP).
- Conducted a half-day conference for vendors who may respond to ETF's RFP; continued answering follow up questions about ETF's requirements throughout the quarter.
- Developed an online frequently asked questions document as a way to cost-effectively and thoroughly address the volume of inquiries about the return to work/rehired annuitant provisions in 2013 Wisconsin Act 20.
- Offered a series of webinars for both members and employers on the return to work/rehired annuitant provisions in 2013 Wisconsin Act 20.
- Implemented a change to offer one contact telephone number for employers needing Help Desk support services. This change facilitates the planned consolidation of all contact numbers for ETF services.
- Automated the transfer of health insurance eligibility and coverage information from the University of Wisconsin Hospital and Clinics to ETF, eliminating the need for data entry into two systems (Peoplesoft and MyETF Benefits).
- Completed a project to create a new process for imaging and viewing ETF's vast archive of paper employer records. This enhancement ensures these valuable historical records are not only available in electronic format for all business users, but also permanently secured--thereby minimizing risk of loss.
- Developed and launched a new webpage that provides military service members and families with the information they need in order to receive all of the Wisconsin Retirement System (WRS) benefits to which they are entitled under state and federal laws.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Completed 16 live member webinars, with 811 attendees. Topics included: annuity adjustments, annuity options, the annual Statement of Benefits and additional contributions.
- Completed 59 small group appointments around the state, with 465 members attending.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed 9/04/13

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EXC	9.25.13	4A

- Launched a new presentation for new and mid-career employees and completed 7 pilot presentations involving more than 220 attendees. Twenty more presentations are set for this fall.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Trained Contact Management Section staff to process beneficiary designations in order to support the workload in another work unit during the annual reconciliation process.
- Conducted a third series of “Donuts at Dawn” trainings, led by Secretary Conlin and Deputy Secretary Marchant, involving eight supervisors and managers for six weeks. Attendees discuss various leadership challenges and strategize on problem resolution.
- Began Security Awareness Training for all staff through a series of short videos developed by the SANS Institute. The videos focus on awareness of the risks and available safeguards for better security of information systems and networks.
- Recognized eight individuals for completing the Department Certified Project Manager Program.
- Offered staff a total of 24 internal training sessions during the period, with a total attendance of nearly 400. The sessions included: personal computing security, unconscious bias, project management-completing a project, leadership roundtable discussion, and maintaining proper customer addresses.

OTHER ACCOMPLISHMENTS

- Contracted with a Financial Management Information System (FMIS) implementation vendor, Sierra Systems, and completed project-related requirements gathering sessions with ETF, Department of Administration (DOA), and Sierra Systems staff.
- Continued role as leading agency in working with DOA on implementing the PeopleSoft Financial suite of Human Resources administration software solutions.
- Continued significant work, along with DOA and the Group Insurance Board, to analyze various cost containment strategies for the state’s group health insurance program.
- Completed the implementation of 2011 Wisconsin Act 10. Provisions of the law required substantial changes to ETF’s information technology systems. The largest parts of the project were completed in 2012, but the few remaining items were completed this year and the project is officially closed.
- Implemented a “Let’s Be Grateful” recognition program in the Contact Management Section. Peers recognize each other for excellent service to internal or external customers.
- Implemented the use of a language line to provide interpretation services to our Limited English Proficient (LEP) members. The service is used via 3-way call during in-person meetings.

- Automated the process for generating annual amended life insurance certificates for state and local annuitants. Previously, it took 30 minutes to manually review and generate an amended life insurance certificate. Automating this process saved more than 865 processing hours thus far.