



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
DECEMBER 2013

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

OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Completed the pilot for the Department's new web-based Accumulated Sick Leave Program application, which allows employers to submit sick leave data online rather than via fax or email. The application, which will save hundreds of staff hours for both ETF and employers, was rolled out to state employers in September.
- Created the ability for employers to run reports through MyETFBenefits (health insurance portal), showing updates made to employee addresses by the National Change of Address process. This will allow employers to keep their addresses in sync and in a correct format.
- Created the ability for employers to assign an agency secondary level code to their employees in MyETFBenefits so large employers can sort requests by location. This benefits large employers like the Departments of Corrections, Administration and Transportation and the University of Wisconsin System by allowing them to sort by specific campus or facility for such information as health insurance invoices.
- Updated design and added new features to the Wisconsin Deferred Compensation Program's website. The improvements went live in August.
- Conducted three day-long sessions in which vendors vying to be selected for the Benefits Administration System (BAS) contract demonstrated their solutions and services, centering on how they would meet ETF's needs. More than 100 staff attended each of the demonstrations, which included question and answer sessions.

EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Initiated a new customer service feature offered at the front desk to help with walk-in service at the Badger Road facility. Now, instead of having only receptionist services at the front desk, a trained Trust Funds Specialist is available to immediately answer member questions. The change reduces the amount of time the member spends waiting for walk-in services.
- Completed 32 live member webinars, with 1,461 attendees. Topics included: annuity options, beneficiary designations, returning to work after retirement, benefit calculations, when to retire (December versus January), and how to use ETF's online calculator.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed 11/18/13

Board	Mtg Date	Item #
EXC	12.4.13	4A

- Enhanced the Call Center's appointment scheduling process, making it easier for staff to schedule appointments, while reducing the overall time previously spent on making appointments by an estimated 400 hours/year savings in staff time.
- Conducted the first meeting of the Employer Advisory Council. A part of ETF's Transformation, Integration and Modernization efforts, this group will help the agency best work with and serve its 1,500 employers. Roles and responsibilities include advising ETF on the process, system and policy changes related to the BAS implementation.
- Completed 64 small group appointments around the state, with 722 members attending.
- Completed the first series of presentations for new and mid-career employees. Completed 10 presentations involving more than 367 attendees.
- Completed eight statewide presentations for members nearing retirement, with 995 attendees.
- Staffed 38 wellness fair booths, reaching more than 3,841 attendees.

STRENGTHEN INTERNAL WORKFORCE TRAINING PROGRAM

- Continued important cross training, knowledge transfer and job sharing activities to support the workforce as preparations for implementing the Benefit Administration System (BAS) begin. These activities will provide more learning opportunities for interested employees; help reduce backlogs in work units experiencing high volumes of work; and help ETF best position its resources during the BAS implementation. Examples include:
 - Having employees from one bureau assist the call center with members who called about appointments and retirement estimates during peak periods in October.
 - Having five employees from another unit help out with finalizing retirement annuities in order to reduce the backlog caused by the unprecedented amount of retirements in 2011.
 - Cross training staff to process beneficiary designations so that there are no delays or backlogs during the four-month annual reconciliation process, which begins in January.
- Nineteen employees participated in a Yellow Belt training provided by Waukesha Technical College. Certified staff are now equipped with the knowledge of how to lead and identify LEAN process improvement projects.
- Twenty-eight employees and two ETF Board members completed training and received certificates in the Retirement Plans and Investment Series provided by the International Foundation for Retirement Education (InFRE).
- Offered staff 38 internal training sessions, with a total attendance of more than 900. Some of the most popular sessions covered such topics as bridging the generational divide in the workplace, an active shooter emergency, and the BAS vendor demos.

OTHER ACCOMPLISHMENTS

- Contracted with an independent internal audit consultant to conduct an external quality assessment review (QAR) to measure conformance with international auditing standards. The QAR was the first assessment conducted by ETF since the internal audit function was established in July 1985. Results provided significant opportunities to more fully conform to standards while providing enhanced services to ETF executive management and the retirement board Audit Committee.
- Extended the contract with a financial statements auditing firm for years 2013 and 2014.
- Completed contract negotiations for new FDIC option provider for WDC program. Transition of account balance will be completed by end of November.
- Developed a centralized calendar so that staff, particularly those that work in units that directly deal with the public, could coordinate better and know when large mailings/communications are distributed.
- Enhanced the legacy screens staff use to allow staff to use the member's ID instead of his/her Social Security number.
- Made several information technology security enhancements, including installing a Network Access Control System that only allows authorized devices to access ETF's internal network, encrypting all laptop hard drives, and implementing mobile device management that allows users to access ETF systems securely with personal or ETF-issued smart phones.
- Completed several internal operations efficiencies and processing tasks that provide staff faster access to employer and member documents. This includes converting 240 paper-based employer files to images (33,194 pages; 12,544 documents), and scanning and indexing 214,875 participant documents.