



**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  
 ACCOMPLISHMENTS REPORT  
 2013 YEAR IN REVIEW**

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments achieved in 2013. These accomplishments are linked to the objective identified in ETF's strategic business plan.

**OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS**

- Completed critical, requisite phases in preparation for launching the new Benefits Administration System (BAS) project. These included:
  - compiling business requirements for the Request for Proposals (RFP);
  - completing and issuing the RFP;
  - holding a prospective vendor's conference;
  - conducting three day-long sessions for three chosen, prospective vendors to demonstrate their solutions and services;
  - reviewing and evaluating vendor solutions at three different peer agencies; and
  - selecting a vendor and beginning the contract negotiation process.
  
- Completed the Enterprise Business Model (EBM) project, which documented all ETF business processes via scenario building. The final EBM documentation was included in the BAS RFP and will assist in the development and implementation of the BAS solution.
  
- Launched the Data Integrity project, a multi-year effort that will lead to a comprehensive inventory and categorization of ETF data; formalization of data authentication processes; correction of data errors; and establishment of rules and processes surrounding data management, integrity, quality and cleansing.
  
- Deployed a new web-based Accumulated Sick Leave Program application, which allows employers to submit sick leave data electronically rather than via fax or e-mail. The application will save hundreds of staff hours for both ETF and employers each year.
  
- Launched a new telephone customer satisfaction survey for members who contact ETF's Call Center.

Reviewed and approved by Robert J. Marchant, Deputy Secretary  
  
 Electronically Signed 3/11/14

Board	Mtg Date	Item #
EXC	3.27.14	4A

## EXPAND OUTREACH TO MEMBERS AND EMPLOYERS

- Created the Employer Advisory Council to garner feedback related to the TIM initiative. 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.
- Kicked off the Financial Management Information System (FMIS) project, which will replace ETF's existing system and processes used for managing financial receipts, disbursements and procurement with a more robust, single source record of all financial transactions. It is also a pilot project for the PeopleSoft financials software, which is scheduled for statewide implementation. ETF's new FMIS is anticipated to "go live" in April 2014.
- 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.
- Offered 95 webinars – live, online presentations delivered via the Internet to 3,941 attendees on a variety of topics, including: annuity adjustments, annuity options, the annual *Statement of Benefits* and additional contributions.
- Launched a new WRS benefits presentation for new and mid-career employees. After completing 7 pilot presentations over the spring and summer, staff gave 17 more presentations reaching 708 attendees last fall.
- Offered numerous training opportunities for employers statewide to learn about their reporting responsibilities. The trainings consisted of 64 webinars and 28 in-person regional presentations, reaching a total of 389 and 672 attendees, respectively.
- 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 Wisconsin Retirement System (WRS). The 10,000 late reported earnings were processed in time for the adjustments to show on employees' 2012 *Statement of Benefits*.
- Mailed to all retirees a special letter providing a "heads up" and detailed information about the 2013 negative Core annuity adjustment.

### **STRENGTHEN INTERNAL WORKFORCE TRAINING**

- Provided LEAN Yellow Belt training to 19 employees. This training educates staff on how to identify and lead 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.
- Offered a total of 20 training sessions, attended by 258 employees. Training events/topics included:
  - Employee Assistance Program – LifeMatters EAP (for both supervisors and non-supervisors)
  - “TIM 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
  - Generations Training
  - Addressing Customer Service
- Redesigned the Department’s Intranet site to make it a more effective resource tool for staff to access information.

### **OTHER ACCOMPLISHMENTS**

- Completed and closed projects to implement the provisions of 2011 Wisconsin Act 32 and 2011 Wisconsin Act 10, which required substantial changes to ETF’s information technology systems.
- Updated the WRS Administration Manual for employers to reflect the recent law changes (2011 WI Acts 10 and 32 and 2013 WI Act 20).
- Automated two formerly labor-intensive processes: One to generate amended life insurance certificates for state and local annuitants and another for capturing Long-Term Disability Insurance Program information from the vendor into ETF systems.
- Converted thousands of paper employer records – some nearly 60 years old – into electronic images to ensure valuable records are permanently and safely stored, easily accessible to business users and available in a format compatible with current and future business practices/methods.
- Signed a contract with a vendor to provide management of election services for board elections. This includes conducting elections electronically, saving resources for the Department, employers and voters. Electronic voting will also potentially increase voter turnout.