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# EXECUTIVE COMMITTEE
# ACCOMPLISHMENTS REPORT
# SEPTEMBER 2014

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments that occurred from May through August in 2014. These accomplishments are linked to the objective identified in ETF's strategic business plan.

## OFFER SELF-SERVICE TOOLS FOR MEMBERS AND EMPLOYERS

- Completed many important milestones that solidify the foundations of a successful Benefits Administration System (BAS) project. These include:
  - Setting up the BAS servers at the Division of Enterprise Technology data center. These servers, set up with advanced security features, will be used for the configuration and testing of the BAS as well as for data reporting.
  - Establishing the governance documents that specify how the project will operate: Risk Management Reporting Methodology, the Problem Incident Reporting Methodology, the Change Control Methodology, the Concept of Operations, the Development Methodology Overview, the Data Conversion Approach and Strategy, and the Project Communications Plan.
  - Conducting 56 BAS requirements validation meetings engaging 93 staff members and covering more than 3,350 requirements. Information from these sessions confirmed the business and technical requirements of the project.
  - Installing the baseline application for configuration by both ETF and Vitech IT developers. The computer environments that the project team will use for development, training and testing are now complete.
  - Completed the master project plan through 2016 and began implementation. The general areas of focus between now and 2016 include functionality related to electronic content management, employer processes and the inputs into the system (e.g. demographic information and employer reporting).
  - As part of the Department's on-going data integrity effort, staff completed evaluating critical data related to service credit purchases.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Pamela L Henning

Electronically Signed: 09/05/2014

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**EXPAND OUTREACH TO MEMBERS AND EMPLOYERS**

- Continued to offer outreach and education opportunities to customers in the second quarter:
    - Completed 44 member webinars with 2,133 attendees. Topics included: steps to retire, using the online calculator, life insurance benefit after retirement, beneficiary designations, effective and annuity rates, annual *Statement of Benefits*, additional contributions, returning to work rules, annuity options, differences between the Core and Variable Trust Funds, and buying service.
    - Completed 48 outreach small group appointments around the state, with 520 members attending.
    - Completed 24 Madison small group appointments, with 174 members attending.
    - Completed 18 statewide public WRS presentations with 2,308 members attending. There were two presentations done in each district – one is for members within five years of retirement and the other is for members that have more than five years before retirement.
    - Offered a series of webinars for employers on various topics such as WRS employer orientation, WRS eligibility, rehired annuitants, and late reported earnings.

- Co-hosted with the Wisconsin Deferred Compensation Program (WDC) a fiduciary responsibilities webinar targeting all WRS and WDC employers.

- Launched a project that will result in the publication of an online newsletter for active employees, an industry best practice. In addition to helping meet strategic communication goals, the switch to an online only newsletter will save more than $100,000 per year in printing and distribution costs.

- Redesigned the Member Education menu on the ETF website to make it easier and more convenient for members to access different ETF learning opportunities, including videos, face-to-face events and webinars. Information is organized by topics of interest for members who are new employees, mid-career, nearing retirement or retired.

- Created an ETF video library on YouTube as another way for members to find relevant information about WRS benefits and view videos on mobile devices.

- In an effort to improve customer service, web accessibility and reduce printing costs, certain information for the 2015 It's Your Choice open enrollment period was moved from the printed guides to interactive web pages on the ETF website. Members and employers will find enhanced online search and sorting capabilities for frequently asked questions, health plan report cards, service area map, statewide benefits fairs, and other helpful links. In addition, web metrics and user surveying can be used.

## STRENGTHEN INTERNAL WORKFORCE TRAINING

- Awarded the first ETF Excellence Award. The award recognizes ETF employees who demonstrate a commitment to those we serve by providing excellent customer service through creativity, innovation, warmth, friendliness, individual pride and agency spirit. There were seven nominees for this first award.

- Conducted staff training related to the BAS project on agile project management methodology, the co-development approach, the importance and fundamentals of testing, and understanding the project plan. Also held a series of orientation sessions for subject matter experts working on the project.

- Ten members of ETF's Business Analyst Council completed the University of Wisconsin School of Business training program and earned their Professional Development Certificate in Business Analysis. The training provides ETF with additional resources in Lean Six Sigma (Yellow Belt certified), project management, meeting facilitation, and stakeholder management skills to support and prepare for ETF's major initiatives.

- Conducted a "respectful workplace" training for all staff to emphasize the importance of a harassment- and discrimination-free work environment at ETF.

- Sent 13 staff to SharePoint Site Administration training. Using SharePoint will enable the agency to have a single source of project information for the BAS project and the State Transforming Agency Resources (STAR) project.

- Released two e-learning modules through the agency's learning management system to introduce new policies – one on information technology and the other on records management.

- Offered professional development training for ETF staff (Moving Up, Down and Around ETF), which covered interviewing skills, job search information and resources, taking civil service exams, etc.

- Continued providing job shadowing opportunities for staff in the business units.

## OTHER ACCOMPLISHMENTS

- Developed, tested and implemented direct deposit for lump sum payments. With the start of direct deposit for lump sum payments in June, electronic deposit is now offered to members for all types of payments, with the exception of those who are rolling money over to another fund.

- Continued the project to implement the 2013 Wisconsin Act 20 provisions that relate to Wisconsin Retirement System (WRS) members who return to work (e.g., rehired annuitants). The project is slated to be completed in September 2014.

- Implemented an investment share class change for a fund in the Wisconsin Deferred Compensation Program (WDC). On August 22, 2014, the T. Rowe Price MidCap Growth Fund changed from a retail share class to an institutional share class. This will result in lower expenses for WDC participants investing through this option.

- Strengthened ETF computer security by implementing stronger login passwords for staff and by enhanced protections against malware found on mobile media devices such as USB memory sticks.

- Successfully negotiated long-term contracts for WRS actuarial services, group health and other group insurance actuarial services.