



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
 Robert J. Conlin  
 SECRETARY

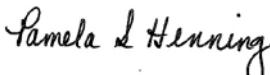
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**EXECUTIVE COMMITTEE**  
**ACCOMPLISHMENTS REPORT**  
**DECEMBER 2014**

This report highlights significant Department of Employee Trust Funds (ETF) accomplishments that occurred from September through November 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:
  - Finalizing the BAS *Statement of Work*, a key document that captures and defines the work and deliverables for the first two rollouts of the BAS Project. The BAS Project consists of three rollouts, which are divided into logical categories and functionality based on business processes, business areas and targeted customers. Completing three BAS Project Sprint Cycles (i.e., design sessions) encompassing more than 100 individual meetings, involving 50 ETF staff members. These sessions centered on imaging implementation, enrollments and demographics, employer wage and contributions processing, and enrollments/elections.
  - Procuring and installing scanning equipment for implementation during BAS Rollout 1.
  - Developing a "pilot" for a new employer compliance program designed to educate and assist employers with state and federal compliance issues that govern ETF benefit programs. The initial pilot involves three WRS employers and centered on employee reporting and eligibility.
  - Completing a *Data Conversion Plan* for Rollout 1 and the first round of data extracts from ETF legacy systems. The extract moved more than 1 million member and employer data fields to the BAS with an extraordinarily high level of accuracy.
  - Hosting the first BAS Technical Summit, which provided an opportunity for the BAS project managers, business analysts and technical representatives to understand the project milestones for the next two years and determine which project milestones had cross-project dependencies.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary  
  
 Electronically Signed 11/17/14

Board	Mtg Date	Item #
EXC	12.10.14	4

### **EXPAND OUTREACH TO MEMBERS AND EMPLOYERS**

- In conjunction with the Wisconsin Deferred Compensation Program conducted a webinar designed to help those nearing retirement think through key issues and considerations en route to making this important decision. The webinar attracted nearly 700 attendees.
- Conducted training on fiduciary responsibilities for municipal district clerks.
- Although the quarter has not concluded, thus far the agency has conducted 63 small group retirement sessions in 31 cities, serving 557 members; 30 “field” presentations – including 25 centering on mid-career employees – reaching 1,010 members; and staffed booths at 5 benefits fairs. Staff also provided service to 1,224 individuals via 31 live webinars on such topics as choosing an annuity option, choosing a retirement date, employer and employee contributions and rates, and how to enhance one’s retirement benefit by making additional contributions.
- Launched interactive web pages for members and employers to access frequently asked questions, health plan map, quality data and other online resources about the It’s Your Choice Open Enrollment period. This included e-learning presentations to increase awareness about the new High Deductible Health Plan and Health Savings Account options. Online surveys will measure user satisfaction.

### **STRENGTHEN INTERNAL WORKFORCE TRAINING**

- Developed a plan to make changes designed to help ETF provide more efficient and higher quality service to employers. Examples include: merging the employer functions from various divisions and offices into one unit. Such a change will reduce the frequency of follow-up phone calls from employers as well as strengthen internal workforce skills, knowledge and training.
- Conducted a comprehensive It’s Your Choice Kickoff training for both internal staff and participating WRS employers on notable changes for the open enrollment period.
- Launched the Educating, Training and Facilitating Academy (ETF Academy), a training program designed for new and experienced ETF employees who are experts in their program areas and interested in developing learning and development programs (training) for staff, employers and members. The academy will include a series of sessions to develop skill sets necessary to develop quality learning and development programs.
- Provided staff training on the use of a software program used to make e-learning programs that are informative and engaging.
- Conducted informative BAS Sprint Cycle “debriefing” sessions for all interested ETF staff. The debriefings provide progress reports that include an overview of configured BAS functionality. Additionally, conducted in-house BAS Project and SharePoint training, providing staff access to complete information and all related documentation on the project.
- Provided Lean Six Sigma Green Belt training to four ETF staff serving on the Process Improvement Team. These staff will add value to work units by supporting business service goals using facilitated, data-driven methodology.

## **OTHER ACCOMPLISHMENTS**

- Developed frequent, targeted communications with members and employers about the court decisions on same-sex marriage in Wisconsin. These included several announcements sent via our *ETF E-Mail Updates* notification service, a frequently asked questions document and a personalized letter to affected WRS members who had a domestic partner affidavit on file with ETF. The letter explained the open enrollment process for health insurance and the effect of the court rulings on the benefits administered by ETF.
- Scanned and indexed 208,605 participant documents during this period – 7,960 more pages than the same timeframe last year.
- Signed a contract with a third-party administrator, TASC, for providing the High Deductible Health Plan and Limited Flexible Spending Account services.
- Implemented the 2013 Wisconsin Act 20 system and business operational changes that relate to WRS retirees who return to work as rehired annuitants.
- Conducted a Continuity of Operations Program exercise that centered on defining initial steps in responding to an attack on our information technology systems. Among the outcomes: seek training from the federal government, specifically the FBI and Department of Homeland Security; and develop investigatory protocols and response team checklists.