



STATE OF WISCONSIN
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**EXECUTIVE COMMITTEE
OPERATIONAL ACCOMPLISHMENTS REPORT
DECEMBER 2015**

This quarterly report highlights significant Department of Employee Trust Funds (ETF) operational accomplishments – daily business activities, successes and milestones – achieved from September to November 2015.

Innovative Solutions

- BAS Rollout 1 launched on November 9, 2015. Efforts supporting this milestone include:
 - Resolving 746 distinct computer issues leading up to Rollout 1.
 - Increasing infrastructure security and reliability by completing the Disaster Recovery plan and moving the non-production and Disaster Recovery BAS systems to the new alternate data center.
 - Developing procedures for myETF to reduce any negative effects on members and minimize issues for internal staff while processing disability claims.
- Information Technology: The ETF Infrastructure Rehosting Initiative (ETFIR) migrated five critical Information Technology (IT) systems to the Department of Administration’s IT services as part of a larger consolidation effort. This involved turning off and decommissioning more than 20 legacy ETF systems.

Financial Stewardship

- Developed and submitted to the Internal Revenue Service a substitute W4-P form. This form allows retirees to submit withholding changes for both Wisconsin and federal tax purposes. The IRS approved this form.
- Received a Recognition Certificate from the Public Pension Coordinating Council for the Wisconsin Retirement System, which recognized certain good-practice standards for public pension systems.

Quality and Value

- Presented ETF’s enterprise-wide Strategic Plan for 2015-2019 to the ETF Board and all staff. In addition, set up SharePoint site for developing and tracking status of strategic objectives and initiatives and reporting results. Trained management, business area subject matter experts, analysts, and the Process Improvement Team to develop initiatives that follow SMART methodology (Specific, Measurable, Attainable, Results-based, Time-bound).

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Electronically Signed 12/1/15

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- Presented at the 2015 State of Wisconsin Lean Government Conference, showcasing the implementation of SMART methodology as a best practice in developing organizational strategy and ETF's strategic planning process.
- Launched multiple collaborative efforts across units that resulted in the reduction of duplicative efforts, improved procedures and creation of new materials for larger initiatives, including:
 - Developing processing materials for myETF benefit work affecting multiple sections.
 - Updating of the Office of Foreign Assets Control procedure.
 - Developing requirements in our system for the STAR-related life insurance changes.
- The EMPOWER campaign held four lunch-and-learn presentations. Topics centered on Social Security, investing, simplifying money, and long-term retirement financial planning strategies. Presentations were webcasted and recorded for on-demand viewing.
- Launched the 2015 Financial Fitness Checkup, in conjunction with the EMPOWER campaign. The tool (survey) was designed to help employees gauge their level of financial fitness (knowledges and behaviors). Results to be shared with state agencies to help design financial wellness programs for employees.
- Received two significant EMPOWER campaign awards: the 2015 Innovator Award from *Pension & Investments* magazine and the Defined Contribution Institutional Investment Association; and the State Council on Affirmative Action 2015 Diversity Award.

Customer Engagement

- Mass communications to members included producing two editions of *WRS News Online* for active employees (September and November) and one edition of *WRS News* for retirees (September). Also expanded our Twitter/social media strategy, tweeting multiple times per day on WRS benefits and other relevant topics.
- Offered new webinars as follows:
 - Employee-focused
 - Converted our two-hour "Nearing Retirement" presentation, normally done in the field, to webinar. This presentation was attended by 122 members.
 - Employer-focused
 - It's Your Choice (group health insurance); 284 local and state attendees.
 - 2016 Uniform Dental Changes; 166 attendees.
 - myETF Benefits; 117 attendees.
 - Health Insurance Eligibility; 50 attendees.

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- Redesigned and distributed It's Your Choice 2016 materials. Also designed and published a new "e-alert" to provide information about health and wellness benefits throughout the year.
- Experienced a 58% increase in call volume in the Member Call Center over last year's open enrollment period. Emails were also up by 60%. The most common inquiries/questions were on the following topics: dental, the health insurance application, health insurance in general, and the \$2,000 opt out health insurance incentive for State Employees.
- Hired a part-time telecom manager to continue serving departmental telecommunication needs and to manage telecommunication process improvements, including laying the groundwork for Voice over Internet Protocol (VoIP) at the new Hill Farms Facility.