



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
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 SECRETARY

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**EXECUTIVE COMMITTEE**  
**OPERATIONAL ACCOMPLISHMENTS REPORT**  
**December 2015 – February 2016**

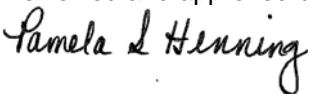
This quarterly report highlights significant Department of Employee Trust Funds operational accomplishments – daily business activities, successes and milestones – achieved from December 2015 through February 2016. All accomplishments relate to the four focus areas of the 2015-2019 strategic plan.

**Innovative Solutions**

- Implemented the new Human Capital Management module of PeopleSoft (STAR), a software program that replaces several aged systems used for payroll and benefits for state employees.
- Achieved an important milestone in the ETF–Infrastructure Hosting project (ETFIR): turning over support for the wide-area networks and firewalls to the enterprise’s Division of Enterprise Technology at the Department of Administration. The goal of the project is to move all commodity computer infrastructure services to the state’s central IT group.
- Finalized strategic objectives and initiatives for the 2015-2019 strategic plan, including fine-tuning the SharePoint site and tools; identifying possible dashboards for quarterly reporting; and installing new mission and vision signage in ETF meeting rooms.
- Streamlined the use of forms to make workflow more efficient. Over the past year, the number of forms pending review decreased from 934 to 183.

**Financial Stewardship**

- Received a 2015 Wisconsin Financial Literacy Award from the Governor’s Council on Financial Literacy for the EMPOWER campaign. ETF was among eight state organizations to receive the award. An educational campaign, EMPOWER was launched in 2015 and is designed to encourage women of all cultures to take charge of their retirement financial security.
- Published the 2014 Comprehensive Annual Financial Report, which included a completed audit of financial statements by the Legislative Audit Bureau and receipt of the Public Pension Standards Award for Funding and Administration from the Public Pension Coordinating Council.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary  
  
 Electronically Signed 3/14/16

Board	Mtg Date	Item #
EXC	3.24.16	4A

- Received Group Insurance Board approval to move forward with four Request for Proposals: self-funding the group health insurance program; pharmacy benefits manager; a wellness benefits administrator; and creation of a data warehouse.
- Conducted the first annual off-site retreat for key ETF policy-making and trust finance staff, ETF leadership and the WRS actuaries. Retreat goals are to improve staff education, collaboration and the development of potential topics for further research or discussion with the governing Boards. Topics at this year's retreat included investment risk, improving plan stability, pension liability modeling and pension legislation.

### **Quality and Value**

- Completed two audits: Annuitant's Payroll and Wisconsin Retirement System Employer Reporting. The audits concluded with reasonable assurance that:
  - The WRS Annuitant's Payroll is processed and reconciled in a timely manner for accuracy and completeness.
  - Controls are functioning as designed.
  - The census data elements reported to ETF by WRS employers for their eligible employees are free from material misstatement.
- Revised the BAS rollout 2 plan, moving it from January 2017 to January 2018 as a result of the lessons learned from Rollout 1. This extended timeline allows for:
  - Greater functionality than previously planned.
  - Less "bridging" to legacy systems, which reduces the margin for error.
  - A longer testing period for both ETF staff and employers.
- Began recruitment for six new testing positions and a business analyst to accommodate the BAS Rollout 2 plan of work.
- Completed several key steps in the Knowledge Management (KM) effort, including finalizing a contract with a KM consultant, hiring an internal KM coordinator and establishing the internal KM Steering Team.
- Resolved more than 6,000 issues over the past year using the internal ETF information technology help desk's Request and Management System (RAMS) tool.

### **Customer Engagement**

- Revised a summary document to assist members who attend group and individual appointments in reviewing key highlights / points covered during their visits.
- Revised the "nearing retirement" public presentations to improve the clarity, readability and overall comprehension of the material.

- Revised the post-event surveys offered to members after Outreach presentations to provide more opportunities for member input on future presentation topics.
- Published two primary mass communications pieces to members: the *WRS News Online* for active employees and the *WRS News* (print) for retirees in January. The January edition of *WRS News Online* marks the one-year anniversary of the e-newsletter format.
- Achieved a goal of 200 Twitter followers by the end of December 2015. There are currently 270 followers as of March 11, 2016. During the reporting period ETF tweeted 69 tweets and garnered 30,700 impressions.
- Launched online and telephone voting functionality for an election involving three seats on the Teachers Retirement Board. Promotions included *WRS News Online*, carousel graphic on the ETF website home page and targeted ETF e-mail Updates to school district employers.
- Provided a mandatory training for all staff on the topic of workplace violence. The event received exceptionally high evaluation scores. ETF is now developing policies and procedures to ensure greater employee and visitor safety in our buildings.