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EXECUTIVE COMMITTEE ACCOMPLISHMENTS REPORT March 2016 - May 2016

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

FINANCIAL STEWARDSHIP (maintaining compliance; administering program benefits for members and employers)

- Presented on the Empower campaign at the Institutional Investors Institute for Defined Contributions Plans April 2016 forum. The Empower campaign's focus is to inspire and encourage women to save for retirement.

- Issued the RFP for the Wellness and Disease Management vendor, which will create a comprehensive wellness program on behalf of the group health insurance program. The overall goal is to improve the health of members and effect health care spending. Vendor selection should be completed in July 2016.

QUALITY AND VALUE (incorporating documentation, testing, risk management; expanding metric-based decision-making)

- Created an internal customer service tracking system within the Division of Retirement Services by using a quarterly scorecard that measures the quantity and quality of high volume services in relation to customer service standards. The first quarter scorecard was completed and distributed to the Department's Leadership Team.

- Improved internal controls on ETF staff access to the federal Social Security Number Verification Number Service (SSNVS) on behalf of the Department. SSNVS is used for data integrity purposes. We now have a process for maintaining controls on access. After these efforts, only seven staff in the Department are authorized to use SSNVS.

- Investigated and mitigated nine security incidents. Six of these were internal, relating to mailing and keying errors; three related to third-party administrators Navitus and TASC.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Pamela L Henning
Electronically Signed 6/8/16

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EXC	6.22.16	4A

- Administered a test of the COOP Pandemic Plan's Morning Reports process. The process tracks ETF's daily rollcall during a pandemic event for staffing and business continuity purposes. ETF supervisors had a 90% participation rate and responded with a 93% positive response to the survey tool used to conduct the test. ETF COOP staff will incorporate lessons learned to make improvements to the next round of testing.

INNOVATIVE SOLUTIONS (BAS; broader efforts to integrate systems, increasing security and flexibility)

- Finalized updates to the myETF (BAS) roll-out #2 (R2) detailed project plan and continued application design efforts required for R2. R2 is largely employer-focused, with some group insurance functionality for members.

- Finalized the Charter for Employer Onboarding project, with updates and minor enhancements continuing to be made to BAS R1, including streamlining some paper processes.

CUSTOMER ENGAGEMENT (educating and communicating with customers to meet their needs; enhancing employee skills, collaboration, productivity)

- Published the May editions of *WRS News Online* for active employees and the *WRS News* (print) for retirees. In this edition we started awareness building about annuity adjustment projections for 2016 and 2017 and the need for members to prepare for continued volatility and low returns in the investment markets. Employees were also asked "Why are you in public service?" as a part of Public Service Recognition Week May 1-7. Collected testimonials will be used in future ETF communications.

- Launched the new Government Relations section on the ETF website. Here members, policymakers and other stakeholders will find relevant and timely information on state and federal legislation that may affect the Wisconsin Retirement System (WRS). Resources include WRS fact sheets, studies and reports, nonpartisan research on national trends in public employee benefits, current and past state budgets, and more.

- Hosted two focus groups to provide feedback on how to improve the It's Your Choice (IYC) section on the ETF website and printed guides. About 20 active employees, employer benefit specialists, and retirees participated in the focus groups; their feedback will help shape IYC communications for the open enrollment period this fall.

- Kicked off the ETF Leadership Academy. Approximately 20 current managers and supervisors will attend ten half-day sessions on topics such as communication, leading change, empowerment and team building. Madison

College is providing the training. We anticipate providing this leadership training to all ETF managers and supervisors.

- Reached full staffing capacity in the call center with the hiring of four new Trust Funds Specialists.

- Produced a new e-learning module on privacy training, for use in new employee orientation. Worforce training on privacy is a HIPAA requirement.