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EXECUTIVE COMMITTEE ACCOMPLISHMENTS REPORT June 2016 - August 2016

This quarterly report highlights significant Department of Employee Trust Funds operational accomplishments – daily business activities, successes and milestones – achieved from June 2016 through August 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)

- Completed the Lump Sum Payment Correction project. Nearly 2,600 payments totaling approximately $2,250,000 were made to former Wisconsin Retirement System (WRS) members. The purpose of the project was to correct payments made between 2011 and 2013 that were initially paid using an incorrect assumed interest rate. ETF has since put in place internal controls to mitigate the risk of a similar oversight in the future.

- Presented on the Empower campaign at the annual UW-Madison Women and Leadership Symposium in July 2016. The Empower campaign's focus is to inspire and encourage women to save for retirement.

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

- Added new staff to the Benefits Administration System (BAS) project, including six dedicated test team members to improve myETF and support ETF's testing subject matter experts; expanded validation processes with improved test cases; established a staff Super-User Team that will aid in business quality, user support and engagement; established a Review Issues, Bugs and Enhancements Team to research, classify and prioritize non-critical system issues; and communicated these efforts to staff through the internal blog.

- Developed training for health plans that will ensure customer data is reconciled between ETF and the plans.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Pamela L Henning Electronically Signed 9/13/16

Board	Mtg Date	Item #
EXC	9.28.16	4B

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

- Moved 52 legacy computer programs running on ETF computers to servers at the state's data center. These programs are used to support or directly process key portions of our member benefits, including the monthly annuitant payroll. Using the state's data center leverages the Department of Administration's advanced IT support and security services and enhances our continuity of operations capabilities.

- Finalized the contract extension for Vitech (BAS Project vendor), addressing product quality challenges and key deliverables.

- Finalized two BAS *Solution Design Documents* related to myETF Employer Online Services and myETF Member Online Services, which customers will utilize when Rollout 2 goes live. These important documents represent the written narrative of the system design work and related decisions to the way ETF's customers will interact with myETF.

- Completed the development of the myETF Employer Payroll File and completed the resource document explaining the Employment File. In addition, presented 21 live webinars, including a recorded session to train approximately 1,200 employers and their payroll vendors on the expanded data they will submit and options for submitting data.

- Due to continued low usage, removed from ETF's phone system the IVR self service functionality, which allowed members to, among other things, order forms through an automated service. The change will help streamline ETF's phone services and improve customer service.

- Launched a pilot project that significantly cut the turnaround time for receiving, imaging and placing documents in a member's file. Since June 1, more than 650 forms were imaged up to 48 hours faster, significantly improving service to members who call to confirm receipt of these materials.

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

- Surveyed all ETF staff, asking questions to help the agency identify improvements to our work environment, training programs and professional development opportunities. The Engagement survey had a 91.7% response rate. In general, staff indicated a need for flexibility in work schedules, a desire for better pay options, and want more opportunities for social interactions with coworkers separated between the two buildings. ETF managers will continue to review the results of the survey to incorporate changes as appropriate.

- Met with the ETF Employers Advisory Council and the ETF Third Party Administrators Advisory Council to 1) present an update on the BAS project and 2) introduce the next electronic file they may use with myETF for submitting employee data between payroll cycles. The session also offered council members an opportunity to ask questions and express concerns.

- Created a wealth of communications for staff to stay informed about the BAS Project, the workings of the Project Management Office and to address change management issues. Highlights include the *Introduction to the Project Management Office* video to familiarize staff with the daily operations of the PMO, and a series of blog postings encouraging paperless process adaptation.

- Conducted 57 small group retirement sessions in 27 cities, serving 593 members; 10 “field” presentations reaching 1,305 members; and staffed booths at 2 benefit fairs. Staff also provided service to 2,181 individuals via 51 live webinars on such topics as Variable Accounts, Annuity Options, New and Mid-Career, Steps to Retire, Buying Service, Returning to Work, Additional Contributions, Online Calculator, Beneficiary Designation, Life Insurance after Retirement, Newly Retired, and the WRS Public Presentation.