



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

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EXECUTIVE COMMITTEE
QUARTERLY HUMAN RESOURCES REPORT
September 2016

This report highlights activities that have taken place since the June 2016 Employee Trust Funds Board (Board) meeting.

Key Hires

The Department of Employee Trust Funds (ETF) has filled 13 vacancies this quarter. Six key hires are shown below:

- Rachel Carabell, Trust Funds Director (Strategic Health Policy Advisor), Office of Strategic Health Policy
- Terri Buttchen, Trust Funds Specialist – Advanced (Leadworker), Division of Retirement Services, Employer Services Section, Training, Compliance, & Support Unit
- Kim Schmidt, Trust Funds Specialist – Advanced (Employer Trainer), Division of Retirement Services, Employer Services Section, Training, Compliance, & Support Unit
- Tim Duggan, IS Supervisor 2, Division of Management Services, Quality Management Section
- Eric Held, IS Systems Development Services – Specialist (Operations Team Lead), Division of Management Services, Applications Development Section
- Andrew Lacy, Accountant – Advanced (Leadworker), Division of Trust Finance

Key Vacancies

ETF currently has 18 vacancies in various stages of recruitment. Four key openings are shown below:

- Trust Funds Supervisor, Division of Retirement Services, Program Administration Section
- Trust Funds Supervisor, Division of Retirement Services, Retirement Planning Section 1
- IS Business Automation – Specialist (QA/QC Testing Team Lead), Division of Management Services, Quality Management Section
- Financial Management Supervisor, Division of Trust Finance, Financial Compliance Bureau

Reviewed and approved by Pam Henning, Assistant Deputy Secretary

Pamela L Henning

Electronically Signed 9/14/16

Board	Mtg Date	Item #
EXC	9.29.16	5A

AFFIRMATIVE ACTION (AA) STATISTICS			
<u>AA Group</u>	<u>Permanent (Percentage/Employees)</u>	<u>Limited-Term Employees (LTEs)</u>	<u>Project Employees</u>
Females	62.5% (162)	71.4% (20)	66.7% (2)
Minorities	13.5% (35)	3.6% (1)	33.3% (1)
Persons with Disabilities	6.9% (18)	10.7% (3)	0% (0)

2014-2017 AA/EQUAL EMPLOYMENT OPPORTUNITY (EEO) PLAN

- At the July meeting, the Inclusion, Diversity, Equity and Advancement (IDEA) committee (formerly known as the Affirmative Action Committee) welcomed a new member, Zekai Otles.
- On June 3, 2016, the IDEA committee held a softball game fundraiser raising \$386 by ETF staff and family members to support the Lincoln Elementary School Scholarship Program. This program provided two Lincoln School alumni with a scholarship to offset college expenses this fall. More than \$1,700 was raised for this worthy cause during a one-month period.
- On August 19, 2016, the IDEA committee held a golf outing for ETF staff as a way to foster inclusion and boost employee morale. Sixteen people participated in the event.
- ETF welcomed two PEOPLE (Pre-College Enrichment Opportunity Program for Learning Excellence) interns this summer. This program is a pre-college pipeline for students of color and low-income students, most of whom are the first in their families to potentially attend college. Their journey prepares them to apply, be successfully admitted and enroll at the University of Wisconsin-Madison. The interns worked in the Division of Retirement Services, Benefit Initiation Section and the Division of Trust Finance.
- In August, the IDEA committee began its annual school supply collection benefitting Lincoln School students.

EMPLOYEE RECOGNITION/APPRECIATION

- Excerpts and letters we receive complimenting staff are posted on the *ETF Community*.
- The Office of Communications set up a “Share a Kudo!” page on the *ETF Community* site for employees to acknowledge their coworkers for a job well done.
- Veronica “Roni” Harper received many well wishes at her retirement potluck in July. Roni was an Employee Benefits Plan Policy Analyst - Advanced with the Office of Strategic Health Policy who focused on optional plans.
- An article in the *ETF Community* recognized 48 employees who reached state service milestones this year. These milestones ranged from 5 years to 40 years.
- The annual ETF picnic was held on August 11, 2016. The picnic was organized by the Wellness Workgroup, the main dish of burgers and brats was donated by the Leadership Team and supplemented with side dishes brought in by staff. The picnic

was complimented by outdoor games, a scavenger hunt and much collaboration between staff.

- On August 4 ETF held its annual youth day event, in which staff were invited to bring their own children or children who play a significant role in their lives to experience life at ETF. Thirty-eight young people spent the day at ETF and participated in a variety of educational and fun activities, including visiting our neighborhood fire department and learning the basics of American Sign Language.

MISCELLANEOUS

- LifeMatters, the Employee Assistance Program provider, posted articles in the *ETF Community* on topics such as understanding grief, coping strategies for dealing with violent events in the news media, and how to get the school year off to a successful start.
- Two employees (Tara Pray, Office of Strategic Health Policy and Marty Griffin, Member Services Bureau, Retirement Services Division) were selected for a scholarship to the Certified Public Management program that starts in October 2016 providing a 20-month leadership and professional development opportunity with other colleagues in state and local government.
- The 2016 Partners in Giving Co-chairs were selected; Jamie Ho from the Member Services Division and Debbie Hafenstein from the Bureau of Information Technology Services.
- The Wellness Workgroup sponsored activities for staff, including on-site chair massages for \$10.
- The agency sponsored an eight-week health coaching pilot. Twenty-four employees participated in this pilot, which also included other agencies such as the Department of Transportation, Public Services Commission and the Department of Administration.

GROUP PRESENTATIONS BY EXECUTIVES/MANAGERS THIS QUARTER			
Name	Group	Topic	Attendees
Lisa Ellinger	Wisconsin Health News Panel	Should the State Self-Insure	150
Tarna Hunter	UW-Madison Women and Leadership Symposium	Empower Campaign	75

PROFESSIONAL ORGANIZATIONS AND POSITIONS OF LEADERSHIP

Name	Position	Group
Bob Conlin	1. Member 2. Member 3. Member 4. Secretary 5. Vice Chair & Secretary 6. Member 7. Member 8. Member 9. Member	1. Wisconsin Health Information Organization Board of Directors (Lisa Ellinger serves as the ETF Secretary's designee) 2. State Bar of Wisconsin 3. International Foundation of Employee Benefit Plans (IFEBP) 4. State of Wisconsin Investment Board (SWIB) 5. SWIB Audit Committee 6. SWIB Strategic Planning and Corporate Governance Committee 7. National Association of State Retirement Administrators (NASRA) 8. National Council on Teacher Retirement (NCTR) 9. NCTR Administrator Education Committee 2016
John Voelker	1. Member	1. International Foundation of Employee Benefit Plans (IFEBP)
Pam Henning	1. Member	1. International Public Management Association – HR (IPMA) (National and Wisconsin Chapters)
Bob Martin	1. Member	1. Project Management Institute (PMI)/South Central WI Chapter
Matt Stohr	1. Member 2. Member 3. Member	1. Wisconsin Certified Public Manager Advisory Board 2. IFEBP 3. State Social Security Administrators
Steve Hurley	1. Member 2. Member 3. Member	1. National Association of Public Pension Attorneys (NAPPA) 2. IFEBP 3. State Bar of Wisconsin

Lisa Ellinger	<ol style="list-style-type: none"> 1. Member 2. Member 3. Vice Chair 4. Member 	<ol style="list-style-type: none"> 1. IFEBP 2. Wellness Council of Wisconsin and Wellness Council of America (WELCOA) 3. WI Health Information Organization (ETF Secretary's designee) 4. State and Local Government Benefits Association (SALGBA)
Dana Perry	<ol style="list-style-type: none"> 1. Member 	<ol style="list-style-type: none"> 1. Public Retirement Information Systems Management (PRISM)
Yikchau Sze	<ol style="list-style-type: none"> 1. Member 2. Member 3. Member 	<ol style="list-style-type: none"> 1. Institute of Internal Auditors (IIA) 2. Association of Public Pension Fund Auditors (APPFA) 3. Information Systems Audit and Control Association (ISACA)
David Nispel	<ol style="list-style-type: none"> 1. Member 2. Member 3. Member 4. Member 	<ol style="list-style-type: none"> 1. Government Lawyers Division, State Bar of WI 2. State Bar of Wisconsin 3. National Association of Public Pension Attorneys 4. Benefits Section Committee, National Association of Public Pension Attorneys