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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
September 2016 - November 2016

This quarterly report highlights significant Department of Employee Trust Funds operational accomplishments – daily business activities, successes and milestones – achieved from September 2016 through November 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 2015 WRS Financial Report.
- Completed the Wellness Request For Proposal (RFP) and procurement, resulting in a new contract with StayWell.
- Completed the Administrative Services for the State of Wisconsin Health Benefit Program RFP (a.k.a., Self-Insurance/Regionalization) and vendor evaluation.
- Completed the Date Warehouse RFP and issued an intent to award to Truven Health Analytics (December 1).

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

- Created a new team to focus exclusively on myETF quality. The team comprises business users from across the department who will focus on the business impact of myETF issues and proposed solutions, proactively update business areas on myETF information, participate in testing, assist with business process changes and analyze ETF's work in the context of myETF capabilities to optimize processes for the greatest efficiency.

- Continued to utilize the enterprise's IT services, now hosted at the Division of Enterprise Technology, including:
    - WebSphere
    - Print services moved to DET
    - Security and legacy systems moved to DET
    - Employer log-on accounts migrated to DET
    - Server infrastructure was converted to a virtual server to improve the success of the file share migration

Reviewed and approved by Pam Henning, Assistant Deputy Secretary
Pamela L Henning Electronically Signed 12/2/16

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

- Successfully launched myETF Rollout 1.5, incorporating product upgrades into myETF and ensuring compatibility of the framework version the project team is developing for Rollout 2. Rollout 1.5 resolved about 74 tickets created to fix or enhance features of myETF. Rollout 1.5 also took steps to improve the system's speed in some areas. This rollout did not require formal training. Instead, staff learned through clever, one-minute videos, short in-person presentations and electronic training materials.

- Implemented the formal myETF Rollout 2 design sessions and began actively planning for Rollout 3. The team is busy aligning resources against a draft sprint plan and will begin design sessions early next year.

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

- Conducted a variety of outreach opportunities to strengthen employers' awareness and understanding of myETF. Project managers presented at the annual It's Your Choice Employer Kickoff and at a payroll software vendor's users group meeting. Since September, ETF trainers offered 17 webinars on the myETF Payroll File Resource and myETF Employment File Resource documents. Many more employers viewed on-demand recordings of the webinars through ETF's website. The project team began collection of employer payroll-cycle data for input into myETF. In addition, the team fielded more than 100 individual employer questions and comments about myETF through a dedicated email inbox. One employer recently stated, "I can't wait for this to happen. It has been a long time coming - I love what I see so far! Great Job!"

- Launched the Financial Fitness Challenge 2016. This free financial education and awareness program is designed to help employees take control of their financial futures and improve their financial well-being. It consists of a confidential and secure online survey to assess and benchmark financial aptitude, habits, and confidence. ETF simultaneously offered the program to Wisconsin state and local government employees, their friends and families.

- Conducted a webinar for Wisconsin Deferred Compensation participants on Collective Investment Trusts. The webinar discussed the differences between mutual funds and collective trust funds. The webinar included who has access to which funds, costs and fees, the regulatory agencies that oversee the funds, how fund information is disclosed and how income is treated.

- Conducted 45 small group retirement session in 23 cities, serving 447 members; 6 "field" presentations reaching 655 members; and staffed booths at 6 benefit fairs. Staff also provided service to 1,725 individuals via 42 live webinars on such topics as additional contributions, annuity options, basic steps to retirement, returning to work, using ETF's online calculator, WRS benefit calculations, choosing a to retirement date, information for new retirees and a WRS benefit overview. ETF also launched a soft rollout of virtual appointments; 6 appointments were completed in September.