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EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
September 2017- November 2017

This quarterly report highlights significant Department of Employee Trust Funds **operational** accomplishments – daily business activities, successes and milestones – achieved from September 2017 through November 2017. 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 a new administrative services contract with Empower Retirement, effective in October 2017. The Wisconsin Deferred Compensation Program will also open a new investment option, the American Beacon Bridgeway Large Cap Value (CIT), to participants on November 17, 2017.
- Published the 2016 Wisconsin Retirement System (WRS) Financial Report, which includes the WRS financial statements, related notes and audit opinion for the year ended December 31, 2016.
- Completed calendar year 2016 GASB 68 schedules, enabling nearly 1,500 employers to meet their financial reporting requirements.
- Completed the fieldwork portion of the ETF Comprehensive Annual Financial Report (CAFR) audit. The published annual report is targeted for December.
- Developed operating budgets at the division/office level; initiated quarterly meetings with managers to review the status of their budgets and developed spending projections for remaining year.
- Completed the Invoice Processing Audit and began implementing recommendations to improve the process.

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

- Completed process and procedure documentation for Accounts Payable, Accounts Receivable and Administrative Accounting.

Reviewed and approved by Pam Henning, Assistant Deputy Secretary

Pamela S Henning

Electronically Signed 11/30/17

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EXC	12.13.17	4A

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

- Completed insertion of multi-factor authentication (MFA) in front of all ETF virtual private network (VPN) remote connections. This additional security feature better protects ETF systems and data by ensuring that the person accessing ETF’s computer systems from the Internet is indeed the ETF staff person whose log-in name is being used.

- Migrated ETF Virtual Private Network (VPN) and Thin Client services to the state data center, allowing ETF IT staff to focus on more valuable, business-specific services and initiatives.

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

- Re-designed the Statement of Identity, a form sent to survivors to identify relatives of deceased when benefits are payable by standard sequence. The improved form is significantly easier for recipients to complete -- which will reduce the incidence of rejections due to errors – and improve internal processing time.

- Hired four new Outreach staff in Member Services, increasing overall Outreach staffing by one position, resulting in:

  - 13 group appointments conducted in the Madison office, reaching 53 members
  - Outreach staff traveled to 28 cities across the state
  - 43 group retirement appointments conducted throughout the state, reaching 435 members
  - Staffing 7 WRS benefit fairs serving 877 people
  - 6 public WRS presentations conducted throughout the state, reaching 533 members
  - 2 public WRS webinars, reaching 222 members
  - 46 webinars reaching 1,103 people
  - 3 private presentations conducted throughout the state, reaching 319 members
  - Online individual appointments serving 68 people

- Reduced training completion time for new hires in Member Services from 24-30 months down to 18 months. This is attributable to a great team effort by trainees, trainer, auditors, supervisors and the ongoing investment and effort to develop quality training content.

- Launched another phase of the Financial Fitness Program coordinating more directly with school districts and local government employers. This phase runs through the end of 2018. The Program, available to all Wisconsin Retirement System members, offers free online financial educational resources for 12 months and a free consultation with a financial advisor.

- Recruited and trained six new specialists in the Contact Management Section (call center).

- Handled a 39% increase in call center volume during the annual It's Your Choice (IYC) open enrollment period over the same period last year. (23,799 calls in 2017 and 17,108 in 2016.)

- Provided the following Employer trainings:
  - WRS Outreach training in 9 cities to 307 employers. In addition:
    - Presentations to the Municipal Treasurer's Association and Wisconsin Association of School Administrators.
    - Presentations to employer software vendors Skyward and ALIO Weidenhammer.

  - Partnered with the myETF Training Team to conduct 10 myETF Employer Online Services (EOS) training sessions in 7 cities, reaching 210 attendees.

  - Provided live and recorded webinars to 1,329 employer representatives on myETF Employer data set up (payroll file, employment file, confirmation file upload, and ICI data setup).

  - Conducted the IYC kickoff, reaching 169 employers attending in-person and 125 attending via live stream.
    - Provided live and recorded webinars on health insurance topics to 373 employer representatives.

- Designed and implemented new IYC enrollment and education materials to assist more than 50,000 ETF health plan members in choosing a new health insurance provider for 2018.