



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

801 W Badger Road  
 PO Box 7931  
 Madison WI 53707-7931  
 1-877-533-5020 (toll free)  
 Fax 608-267-4549  
 etf.wi.gov

**EXECUTIVE COMMITTEE**  
**QUARTERLY HUMAN RESOURCES REPORT**  
**December 2017**

This report highlights activities taken place since the September 2017 Employee Trust Funds Board (Board) meeting.

**Key Hires**

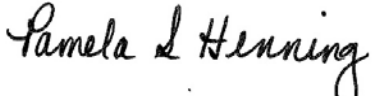
The Department of Employee Trust Funds (ETF) has filled 16 vacancies this quarter. Five key hires are shown below:

- Marcia Doll, IS Business Automation Specialist (IT Infrastructure Project Lead), Division of Management Services, Bureau of Information Technology Services, IT Solutions Center Section
- Doug Hennick, Trust Funds Specialist-Advanced (Leadworker), Division of Retirement Services, Member Services Bureau, Retirement Planning and Outreach Section 2
- Tara Pray, Employee Benefit Plan Policy Advisor–Advanced (Member Engagement and Communications Leadworker), Office of Strategic Health Policy
- LaShay Bishop, Trust Funds Specialist-Advanced (Leadworker), Division of Retirement Services, Benefit Services Bureau, Benefit Initiation Section, Unit 2
- Jim Guidry, Trust Funds Director, Division of Retirement Services, Benefit Services Bureau

**Key Vacancies**

ETF currently has 31 vacancies in various stages of recruitment. Six key openings are shown below:

- IS Supervisor 2, Office of Enterprise Initiatives, Project Management Office
- Trust Funds Specialist-Advanced (Outreach Leadworker), Division of Retirement Services, Member Services Bureau, Retirement Planning and Outreach Section 4
- Trust Funds Specialist – Advanced (Leadworker), Division of Retirement Services, Employer & Contact Services Bureau, Employer Services Section, Insurance Unit
- Accountant-Advanced (Leadworker), Division of Trust Finance, Financial Compliance Bureau
- Employee Benefit Plan Policy Advisor-Advanced (Disease Management and Wellness Program Manager), Office of Strategic Health Policy

Reviewed and approved by Pam Henning, Assistant Deputy Secretary  
  
 Electronically Signed 11/30/17

Board	Mtg Date	Item #
EXC	12.13.17	5A

- Employee Benefit Plan Policy Advisor-Advanced, Division of Retirement Services, Benefit Services Bureau

<b>AFFIRMATIVE ACTION (AA) STATISTICS</b>			
<b><u>AA Group</u></b>	<b><u>Permanent (Percentage/Employees)</u></b>	<b><u>Limited-Term Employees (LTEs)</u></b>	<b><u>Project Employees</u></b>
Females	64.2% (158)	73.3% (22)	100% (2)
Minorities	13.4% (33)	10% (3)	0% (0)
Persons with Disabilities	3.7% (9)	6.7% (2)	0% (0)
Veterans	6.1% (15)	0% (0)	0% (0)

**2017-2020 AA/EQUAL EMPLOYMENT OPPORTUNITY (EEO) PLAN**

- In October the IDEA Committee sponsored and promoted a Lunch & Learn session titled “[In]visible Disability”. The IDEA committee chair, Laura Ogle, gave an insightful presentation about the visibility and invisibility of disability, and how it applies to the workplace. A total of 9 ETF staff were in attendance.
- A total of 10 Thoughtful Thursday events have been held to date. This informal drop-in lunchtime gathering, hosted by a representative of the IDEA committee on the 1<sup>st</sup> and 3<sup>rd</sup> Thursdays of the month, has been well received and has fostered interaction and camaraderie among staff.
- The AA Officer and IDEA Chair restructured the IDEA committee to include two subcommittees on inclusivity and diversity to focus more on social activities and on education on diversity and AA topics. The committee membership will increase from the current seven members to nine. The purpose of the restructuring will be to establish specific expectations for committee members to accomplish its goals in a more effective and efficient fashion.
- The IDEA committee in conjunction with the Department of Revenue Diversity Committee jointly hosted a Cultural Potluck in November. Staff prepared ethnic dishes to share; proceeds were donated to the Partners in Giving campaign.

**EMPLOYEE RECOGNITION/APPRECIATION**

- Excerpts and letters we receive complimenting staff are posted in *ETF Community*.
- ETF staff attended an ETF Town Hall in September. The theme, “Making a Difference,” focused on how ETF staff make a difference to our members, employers, community and each other.
- ETF staff may purchase Microsoft Office 2016 software for their home computers at a significantly reduced price.
- For Veterans Day ETF recognized staff who served in the military, through an *ETF Community* article and on Twitter.

- Deb Roemer, who spent more than 19 years at ETF and has provided more than 35 years of service to the State was recognized for her contributions at a retirement send-off in November. Most recently, Deb served as the Bureau Director of the Benefit Services Bureau.

**PARTNERS IN GIVING**

- Several activities were hosted at both ETF locations to support the Partners in Giving campaign. Some of those activities included a cultural potluck, bake sale, chili/curry cook-off/costume contest, coin wars, sports gear day and silent auction. The goal for ETF is to raise \$35,000 and have a 57% participation rate by the close of the campaign.

**MISCELLANEOUS**

- The ETF Health and Safety Committee sponsored an American Red Cross blood drive in September.
- The ETF Health and Safety Committee sponsored two flu shot clinics.
- The Wellness Workgroup sponsored activities for staff, including on-site chair massages, weekly yoga and posted helpful articles in *ETF Community* on topics such as Understanding Health Values and The Truth About Addiction.
- The Wellness Workgroup wrapped up another successful season with the Community Supported Agriculture (CSA) program. This program allows ETF employees to receive fresh vegetables locally grown on a weekly basis during the growing season.
- The Wellness Workgroup supported the Great American Smokeout campaign via an *ETF Community* article highlighting tips for supporting those trying to stop smoking.

<b>GROUP PRESENTATIONS BY EXECUTIVES/MANAGERS THIS QUARTER</b>			
<b>Name</b>	<b>Group</b>	<b>Topic</b>	<b>Attendees</b>
Bob Conlin	Retired Professional Fire Fighters of Wisconsin (RPFFW)	WRS Update	75
Bob Conlin	Wisconsin Retired Educators Association	WRS Update	300
Bob Conlin	Council of State Governments Pension Policy Academy	WRS Update	100
Bob Conlin	Milwaukee County Task Force	WRS Assumed Rate of Investment Return	35
John Voelker, Matt Stohr	Wisconsin Annual Judicial Conference	ETF Update	100

**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 (John Voelker serves as the ETF Secretary's designee) 2. State Bar of Wisconsin 3. International Foundation of Employee Benefit Plans (IFEBC) 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 2017
John Voelker	1. Member	1. IFEBC 2. WHIO Board of Directors and Executive Committee Member
Pam Henning	1. Member 2. Member	1. International Public Management Association – HR (IPMA) (National and Wisconsin Chapters) 2. IFEBC
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. IFEBC 3. State Social Security Administrators
Steve Hurley	1. Member 2. Member 3. Member	1. National Association of Public Pension Attorneys (NAPPA) 2. IFEBC 3. State Bar of Wisconsin

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