



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

Wisconsin Department
of Employee Trust Funds
PO Box 7931
Madison WI 53707-7931
1-877-533-5020 (toll free)
Fax 608-267-4549
etf.wi.gov

**EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
March 2018 - May 2018**

This quarterly report highlights significant Department of Employee Trust Funds **operational** accomplishments – daily business activities, process improvements, successes and milestones – achieved from March 2018 through May 2018. 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)

- Documented and reviewed all local employee Income Continuation Insurance (ICI) enrollment applications for local employers participating in the ICI program, resulting in:
 - new information to improve employer training
 - improved alignment between ETF and employer ICI enrollment in the event the premium holiday expires.
- Conducted a collaborative audit of the 2017 ICI Evidence of Insurability (EOI) applications to ensure timely and accurate processing by AETNA.
- Completed the transition of four LTDI program administrative functions from Aetna to ETF.
- Completed annual benefit update calculations for the LTDI and Duty Disability programs.
- Successfully completed Annual Processing tasks including Annual Reconciliation, Interest Crediting, Variable Transfers and the creation of Statement of Benefits.

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

- Commenced a detailed review of ETF's project management methodology to determine which areas of the methodology would benefit from reengineering.

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Electronically Signed 6/11/18

Board	Mtg Date	Item #
EXC	6.20.18	4A

- Updated and presented several Board Policies to the Group Insurance Board, to reflect changes in law and for better clarity. The GIB approved material changes in the Communications Policy to reflect new procedures for handling of materials provided to the Board. In upcoming Board meetings, Board Policies will be updated and presented for approval by the Deferred Compensation Board and by the Retirement Boards.
- Completed primary Continuity of Operations Plan (COOP) content updating and revalidation with the Department of Administration (DOA). ETF's COOP content resides on the DOA-hosted Sustainable Planner platform in compliance with statewide standards, and provides an organizational inventory of all ETF essential functions, internal and external dependencies, resources and key contacts and stakeholders needed to perform those functions. ETF's COOP Plan is accessible 24/7 to agency COOP administrators for immediate response capabilities.

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

- ETF successfully moved all 395 ETF employees and contractors to the new Hill Farms State Office Building the week of March 26. All technology changes and updates were completed prior to the move and there were no service disruptions.
- With the decommissioning of computer equipment in our former Badger Road headquarters, ETF fully completed its computer infrastructure re-hosting to the state's data center. ETF no longer has its own data center.
- Undertook an enterprise effort prioritization process to determine which future projects are mission critical to ensure we focus efforts based on business value.
- Completed an analysis of the current status and detailed description of the 16 efforts related to the Benefits Administration System project.
- Developed comprehensive diagrams of ETF's current-state business processes.
- Evaluated the Data Integrity Project for applicability to current and future business needs.

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

- Maintained uninterrupted service in the Call Center over the two-day move to the new Hill Farms State Office Building. This includes handling call volume that increased 3.3% over the same period in 2017.

- Created and delivered a 16-part training series for ETF's technical development team and business analysts to build a broad base of knowledge of our legacy computer systems and the related business activities supporting them.
- Filled five Trust Funds Specialist positions in the Benefit Initiation Section units.
- Provided a disability redesign update to the State Payroll Council.
- Completed planning and project kickoff for a knowledge management system on the SharePoint platform. This system will be used internally at ETF to manage the document lifecycle (creation, collaboration, storage, retrieval, and disposal). The primary objectives of this project are to provide:
 - one source for final, approved, published content accessible to all
 - automated content review and approval
 - automated records retention and disposition process.
- Completed digitization of legislative history files, actuarial and annual reports, news clips, and employer rates. In total, 3,631 files have been digitized (147,695 pages) and made searchable.
- Completed a project to review and purge the fiche stored at ETF. Approximately 35,000 pages of fiche were destroyed because they had met the required retention or were not ETF records. Approximately 74,000 pages of fiche were sent to the State Records Center for storage. In total, approximately 960 pounds of fiche were removed from our location.
- Seven members of the ETF Internal Training Workgroup successfully completed the UW Professional Trainer's Certificate Program. This was a six-day program that provided many innovative training activities and resources for training development and presentation. These employees will be sharing resources and training tools from this program monthly with the other employees in the Internal Training Workgroup, Members Services and Employer Services so we may increase the quality of our employee, member and employer training/presentations.
- Employees successfully completed approximately 835 hours of training by completing the following curricula with a completion rate of over 95%:
 - Wisconsin Public Records Training
 - Creating a Safe Workplace
 - Hill Farms Move Curriculum
 - DOA/DET Security Training