EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
June 2021 – August 2021

This quarterly report highlights significant Department of Employee Trust Funds **operational** accomplishments – daily business activities, process improvements, successes and milestones – achieved from June 2021 through August 2021. All accomplishments relate to the four goals in the current strategic plan.

EFFORTLESS CUSTOMER EXPERIENCE (increasing employer competency for managing benefits; increasing member personalization for managing their benefits)
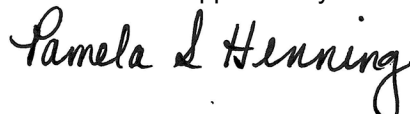
Employer
- Improved several employer web pages to make it easier for new local employers to navigate to the information they need when they need it.

- Launched an automated process to incorporate University of Wisconsin Hospital and Clinics (UWHC) Income Continuation Insurance (ICI) and Life insurance enrollments so that UWHC no longer has to send paper forms for processing by ETF staff.

- Presented a well-received Accumulated Sick Leave training program for state employers during the new ETF Update meeting (former Payroll Council).

Member
- Resumed in-person services for one-on-one member meetings in the Hill Farms State Office Building.

- Added ETF Form ET-5333 Disability Annuity Option Change Application to the internal service request menu. This change allows Call Center staff to immediately order the form to be sent to members without handing the call off to another staff member.

- Provided two webinars for the Department's financial wellness effort (WI Strong) in August: "Retirement Planning for Women" and "Investments 101 for Women."

- The Wisconsin Deferred Compensation (WDC) Program was awarded a 2021 leadership award in the area of plan design and administration from NAGDCA (National Association of Government Defined Contribution Administrators) for the WRS pension estimate pilot.

- Secured a new online member education tool, Benefits Mentor, that will be launched in September for the 2022 Open Enrollment period. Benefits Mentor provides members access to their historical claims and premium information to help them select the benefit plan that is right for them. Benefits Mentor is designed for active state employees and pre-Medicare retirees, and replaces ALEX, ETF's former benefits education tool.

Employers and Members
- Created the new [Well Wisconsin for Members](#) and [Well Wisconsin for Employers](#) webpages to provide easier access to information without having to login to a portal account to learn more about the program.

PERFORMANCE MEASUREMENT AND PROCESS MANAGEMENT (expanding metric-based decision-making to optimize key capabilities; expanding business process management to improve operations and support innovation)

- Improved the process of running a monthly payroll job from nine hours to approximately 30 minutes, reducing the amount of staff time needed to monitor the process over the weekend and greatly reducing cost of running the job itself.

- Revised and wrote multiple new procedures in preparation for the Enterprise Content Management (ECM) system.

- Implemented a new production tracking system for Benefit Initiation Section (BIS) specialists, allowing supervisors to review production statistics for staff and develop a productivity score based on individual results. BIS's main responsibility is to set up annuity payments for our retirees.

- Updated the Benefit Payment System to enable ETF to track and monitor annuitant accounts subject to IRS maximum benefit rules and Wisconsin rehired annuitant statutes. These updates allow ETF to more efficiently identify these accounts annually.

- Completed the Uniform Dental Benefits (UDB) and the Life Insurance Request for Proposal (RFP) processes ahead of schedule.

- Streamlined the process for delivering annual health plan preliminary premium bid tiering letters, reducing a two-day process down to approximately one hour of staff time.

TALENTED AND AGILE WORKFORCE (attracting, integrating and advancing top talent; advancing employee development through meaningful performance management approaches; implementing recruitment and retention practices to support equity and inclusion.)

- Completed Reconstitution (Return to Workplace) efforts, including:
  - development of online training modules and resources to ensure workplace health and safety.
  - a Clean Sweep effort to ensure all ETF workspaces are cleaned and sanitized.
  - setting up cubicles and work areas to accommodate hybrid workplace needs including hotel and shared cubicles and offices.
  - implementing technology to support collaboration in a hybrid work model.

- The Employer Services Insurance Section was restructured into two units that provide service to different audiences, active and retired members. The Lead Worker in the Insurance Section was promoted to a Supervisor of the second unit.

- Hired a Security Analyst contractor to monitor ETF's information technology infrastructure for security risks and to proactively remediate vulnerabilities by monitoring dashboards and logs, responding to incidents, reviewing vulnerabilities, and scanning ETF web applications.

- Hired a Special Projects Lead to support ETF strategic initiatives and special projects. This person is a key contributor to ETF's enterprise architecture efforts and making ongoing business process improvements.

- Hired two Trust Funds Specialists in the Member Call Center Section.

- Hired three Trust Funds Specialists in the Benefit Initiation Section.

- Hired a new Lead Worker and four Trust Funds Specialists (two contractors and two FTE positions) in the Member Services Bureau.

- Launched a new Data Hero recognition program to promote critical data literacy behaviors. Selected nominees are recognized quarterly in the ETF Community blog. In addition, they receive a printed certificate and digital swag they can choose to display.

- Provided 37 instructor-led, remote training sessions to prepare staff and third-party administrators to work in ETF's new ECM system, OnBase. In addition, the team hosted "sandbox" sessions to allow participants to practice new skills and learning labs to evaluate learning quality. The evaluations for the OnBase introductory courses indicate that 92% of attendees look forward to using OnBase

- Updated ETF's onboarding curriculum to include our new Executive Team and shared the new eLearning modules with all staff.

- Designed and published curriculum content supporting the ETF Equity & Inclusion Plan initiative including:
  - Psychological Safety Training for the Joint Boards & Strategic Council/Agency Management Council
  - Interview Question Development Based on Knowledge, Skills & Abilities

- Participated in the State of Wisconsin Student Diversity Internship Program, coordinating a graduate student's work as it pertains to ETF's programs.

MODERN, SECURE AND RESILIENT INFORMATION TECHNOLOGIES (developing and deploying customer-focused solutions; integrating systems and processes for seamless, timely and secure stakeholder experiences)

- Enterprise Content Management System - Completed a five-week user acceptance testing of the ECM OnBase imaging and workflow system that prepared business area trainers and SMEs to support their colleagues with OnBase implementation this fall. As of August 10, 83 percent of the documents and datasheets in ETF's current system are migrated into OnBase.

- Insurance Administration System - Finalized contract negotiations with Benefitfocus to provide ETF's Insurance Administration System (IAS), and initiated planning with project sponsors and management and technical and business resources.

- Data Management
    - Supported the completion of Phase 1 of the Master Data Management (MDM) software implementation. This system will determine the best member demographic and contact information across multiple current and future systems. The tool automatically matched over 1.4 million Person Demographic records from three source systems, and Data Stewards are nearly finished reviewing and confirming the remaining 2,500 Person records that could not be system matched. Phase 1 is sharing data with the ECM system and future project phases will connect to other systems.

    - Enhanced Data Analytics – Insurance Program - Secured a seven-year-contract amendment with IBM Watson Health to provide data analytic resources on the Group Health Insurance Program, ensuring ETF will have a stable data analytics platform from which it can continue to develop its analytic capabilities.

- Information Security
    - Successfully implemented additional Multi-factor (MFA) Authentication for our cloud-based productivity tools (Microsoft Office 365) for staff to maintain access and authentication security for our data and network environment, addressing a critical security risk related to phishing attacks on our Microsoft environment.

    - Implemented a technical solution to improve the security of member bank account information in compliance with new guidelines from the National Automated Clearing House (NACHA) Association (the organization that manages the development, administration, and governance of the ACH Network, including direct deposits and direct payments).

    - Enhanced IT security by reaching the 90% mark for vulnerability remediation ticket completion, securing ETF devices and servers from security vulnerabilities and potential hacks in our environment.

- Began the SharePoint migration of existing sites to the new SharePoint Online environment in April. To date, ETF staff have completed the three agency Governance sites, nine business areas, and several automated workflows to improve efficiencies. The migrations will continue through the end of 2021.

- Finalized a Fraud Response Plan (Plan) that clarifies the ways that staff can report fraud concerns, including the use of anonymous reporting. The Plan establishes a centralized fraud team responsible for investigating and resolving reported fraud issues. The Plan is intended to augment existing incident response plans, such as ETF's Information Security Incident Response Plan.

- Moved the Enterprise Survey Inventory and Improvements project team into Phase 2 of the project, outlining a future process and a potential software implementation. The team outlined standard operation procedures for surveys.

OTHER NOTEWORTHY ACCOMPLISHMENTS

Insurance Program
- Working with ETF's disability actuary, completed the valuation of the Duty Disability program. The valuation helps determine the Duty Disability premium rates for the upcoming year. The valuation was used by the ETF Board to approve a 50% reduction in duty disability rates for 2022.

- Onboarded a new health plan, Aspirus, into the Group Health Insurance Program which will increase competition among our contracted health plans and provide more health plan options for our members.

- Successfully utilized the data within the IBM's Data Analytics and Insights (DAISI) data warehouse to project anticipated healthcare costs for the next year. The analysis was utilized in health plan rate negotiations and resulted in a substantial decrease in health plan rates for the 2022 plan year. Considering the impact COVID-19 had on healthcare, this new capability could not have been exercised at a better time.

Administration
- Reviewed and approved ETF's State Fiscal Year (SFY) 2022 Operating Budget. The SFY 2022 approved budget totaled $56.4 million and will continue to support ETF's core functions and ongoing modernization efforts.