

**EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
September – November 2021**

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

EFFORTLESS CUSTOMER EXPERIENCE (increasing employer competency for managing benefits; increasing member personalization for managing their benefits)

Employers

- Provided virtual Employer training sessions to prepare employers for annual reconciliation, which included mid-year “check in” sessions. This session was attended by 325 employers.
- Updated the employer login pages, promoting sign-on self-service options with the goal of decreasing the number of login assistance phone calls received.

Members

- It's Your Choice (IYC) Enrollment Period
 - Successfully answered 16,563 calls during It's Your Choice (IYC) Open Enrollment period, an increase of 8% over last year. The average speed of answer during IYC improved 37% over last year, largely because of efforts made by managers to reallocate staff temporarily to help with calls.
 - Presented 20 Virtual Health Benefit Events for members during the IYC period on five topics:
 - Health Insurance & Pharmacy Benefits for Active Members,
 - Health Insurance & Pharmacy Benefits for Retirees,
 - Dental and Supplemental Programs,
 - Pre-Tax Savings Accounts, and
 - Wellness Program.
 - Topics were offered four times each. These virtual events provided members with an opportunity to view a pre-recorded presentation and participate in a live question-and-answer session following the recording.
- Began offering daytime online group retirement appointments for members. These are similar in format to the evening online groups which were initiated in June 2021.
- Converted three webinars to push-play and have a fourth that is in progress. In addition, ETF is launching a new tutorial video for completing the How to Fill Out Your Retirement Estimates and Application (ET-4301).
- Completed a full year of statistics for incoming member communications, showing that:
 - Incoming email volume increased more than 10% in September 2021 as compared to September 2020 (from 2,990 to 3,313).
 - Incoming phone calls increased more than 10% in September 2021 as compared to September 2020.
 - While no true metrics exist to pinpoint the cause for the increase, staff are citing an increase in eligibility questions.

Employers and Members

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary – Electronically Signed 11/16/21

Pamela L Henning

Board	Mtg Date	Item #
EXC	12.08.21	4A

- Implemented a system that integrates ETF applications while linking business processes and ensuring data integrity, quality, and consistency between systems. This will benefit members, employers, and other stakeholders by supporting a more seamless interaction with ETF regardless of IT system being used.

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

- Reviewed and classified several record sets maintained onsite and confidentially disposed of or moved them to the State Records Center, ensuring compliance with our statutory records management responsibilities and securing access to files that we may need to reference in the future.
- Completed annual reconciliation of the Long-Term Disability Insurance Access database with ETF systems information. This annual process ensures any benefit information housed in the database is accurate and matches the information in ETF's Benefit Payment System (BPS).
- Updated Data Quality Check Points to identify variable fund cancellations that are mismatched between BPS and WEBS, or fund transfers that did not occur. This updated process will help ensure that all transfers between core and variable funds occur accurately and timely.
- Launched a Preparedness Planning workgroup to ensure consistent standards are in place for planning and conducting testing, training and exercises for incident response and Continuity of Operations Planning efforts.
- The Insurance Administration System (IAS) project team and subject matter experts (SMEs) attended Business Process Management (BPM) training. This workshop reviewed BPM methodology and how our team will utilize process tools and mindsets throughout the IAS project.
- Implemented a plan for regular, structured reviews of completed workflows, phone calls, and member appointments. The scorecards used will improve the quality of feedback, providing an opportunity to identify and communicate broader issues such as training needs or process improvement opportunities.

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.)

- To support successful ETF communications during the IYC Open Enrollment, the number of internal virtual training sessions was increased, resulting in higher staff attendance for trainings and the kickoff event in 2021 compared to last year's

attendance (from 28 in 2020 to 99 in 2021).

- Hosted more than 161 ETF staff for two well-received National Cybersecurity Month presentations to increase staff awareness and provide security tips and guidance, including both work and personal best practices.
- In preparation for ETF's return to the office planning to begin hybrid work schedules, the following reconstitution efforts were conducted:
 - Offered three ETF-COVID question-and-answer session, attended by 77 staff, to provide factual information and answer questions about COVID-19 variants, vaccinations, and other aspects of the pandemic.
 - Developed and launched the required eLearning module, "ETF Health & Safety Expectations."
 - Completed the "Operation Clean Sweep" effort to prepare the ETF suites for the new hybrid workspace, including thorough cleaning of all cubicles and offices and reconfiguring the floor spaces to accommodate hotel cubicle needs.
 - Implemented a new process to enable staff to reserve "hotel" workspaces using Outlook. This approach will allow the agency to make better use of office space in the current hybrid work setup.
- The Enterprise Content Management (ECM) Project completed instructor-led training, consisting of the following OnBase sessions:
 - 101 Sessions – 16 Sessions – (220 Trainees)
 - Case Management Sessions – 12 Sessions (176 Trainees)
 - Document Research – 2 Sessions (51 Trainees)
 - Dashboard Viewing – 3 Sessions (52 Trainees)
 - Self Sufficiency – 1 Two-day Session (3 Trainees)
 - Power User – 1 Session (11 Trainees)
 - Overview for BITS Staff – 2 Sessions (25 Trainees)

The team also developed and hosted the following events:

 - Learning labs resulting in 103 staff earning Certificates of Proficiency in OnBase
 - Eleven OnBase sandbox sessions
 - Three new micro trainings to assist staff in keeping their training fresh
 - An OnBase 101 video training for new employees
- Data Management
 - The Data Literacy project announced third quarter Data Heroes: Jay Platta, security analyst, and Stephanie Potter, accountant, for displaying key data literacy traits such as: curious and passionate about data; thinks critically about data; enterprise data mindset; tells data-driven stories and more.
 - Launched a User Group to promote best practices and knowledge sharing for business intelligence dashboards and data visualizations.
- The IT Ops & Support Model Project completed feedback meetings with all business areas. The team is focusing on service offering descriptions (SOD) and future role definitions.

- Successfully uploaded the first round of ETF's historical training records data into the new DOA-hosted Learning Management System.

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

- Data Management
 - Completed the conversion of over 20 million forms from an ETF legacy system to a modern cloud-based ECM application, ensuring secure and efficient access to ETF member and employer documents.
 - Data Storage, Warehouse, and Business Intelligence project completed a "soft launch" giving specific staff self-service access to "person demographic data" in the Data Warehouse. This access supports the Enterprise Content Management project.
 - Master Data Management (MDM)
 - Successfully deployed from GitHub, its vendor platform, to the User Acceptance Testing and production environment. The project team is focusing on identifying and documenting the process to migrate code and planning a series of demonstrations and learning labs as part of transition management to train staff on GitHub.
 - Launched Phase 2, which will shift the project's focus to support the Insurance Administration System project while remaining ready to support Enterprise Content Management go-live.
- Insurance Administration System
 - The IAS project team and Benefitfocus vendor teams formally kicked off the project with project management, technical, business resources, SMEs, and project sponsors.
 - Benefitfocus facilitated over 30 Discovery sessions. These sessions are part of Benefitfocus' methodology to understand ETF-specific processes and will inform the technical build-out of the IAS platform.
- Completed the following components of the SharePoint migration of existing and new sites to the new environment:
 - Completed three agency Governance sites, 10 business areas, and over a dozen automated workflows to improve efficiencies.
 - Business area customizations and training were provided to enhance the usability of the SharePoint tools.
 - Proof-of-concept work for external collaboration will occur alongside migrations during first quarter of 2022, with the migrations continuing through the second quarter of 2022.
- The Enterprise Survey Inventory and Improvements project team completed the first iteration of the Enterprise Survey Playbook. This playbook serves as the standard

operating procedures for administering and data storage for Survey Monkey external surveys.

- Member Self-Serve Access Technology - Continuing leadership role over many facets of the statewide effort to implement Okta, a new authorization and authentication system. This will allow members and other key users of ETF's modernized systems to securely login and ensure appropriate access to their data. In the past quarter, the combined State of Wisconsin team completed the initial configuration in preparation for the first two applications, which other state agencies will deploy.