EXECUTIVE COMMITTEE
ACCOMPLISHMENTS REPORT
September 2024 – November 2024

This quarterly report highlights the Department of Employee Trust Funds highest-value strategic and operational accomplishments—including daily business activities, process improvements, successes, and milestones—achieved from September to November 2024. 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)

Employer

- Offered employer outreach opportunities in preparation for Annual Reconciliation. ETF has scheduled 18 live webinars to help employers achieve a successful reconciliation of member data. In addition, ETF case managers are wrapping up their annual targeted outreach to their assigned employers, with a focus on prior-year reporting anomalies.

Member

- Customized information sent to survivors depending on eligibility for a lump sum or a monthly annuity. This makes it easier for survivors to understand their options, potential tax implications, and timelines to apply for benefits.

- Updated the member call tree to add an option for members calling about their health insurance. The change will give more accurate data about the number of calls that are primarily about health insurance.

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

- Implemented a process improvement to ETF's Morning Reports process using existing functionality in MS Teams. The Morning Reports process is a critical business continuity tool used to account for staff and assess staffing needs during abnormal working conditions. This process improvement reduces the complexity and lead time needed to make important data available for decision making.

TALENTED AND AGILE WORKFORCE (attracting, integrating, and advancing top talent; advancing employee development through meaningful performance

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Board	Mtg Date	Item #
EXC	12.11.24	4A

management approaches; implementing recruitment and retention practices to support equity and inclusion.)

- Created a new call quality scoring template to be used to review and evaluate member calls. The new template is more flexible than the current one built into the Centurion CARES call routing system. The scoring is easier for staff to understand, and dimensions scored will be more meaningful.

- Completed and launched to all employees a multi-year, large-scale update of the ETF Employee Handbook. This effort clarified ambiguity, updated or removed outdated policies, and created a single location for HR policies. All employees were required to complete a review and acknowledgement of the updated handbook by November 15 to ensure familiarity with current policies and resources.

MODERN, SECURE AND RESILIENT INFORMATION TECHNOLOGIES (developing and deploying customer-focused solutions; integrating systems and processes for seamless, timely and secure stakeholder experiences). This includes the Enterprise Content Management, Insurance Administration System (IAS), data management, and information security.

- The IAS project is nearing completion of requirements gathering, development, and testing of data conversion for approximately 475 employers. Data conversion testing for retirees has completed.

- Deployed the Employer Transaction Application for end-to-end testing with agency partners and vendors. This is a new ETF application where employers will report demographic and insurance eligibility information required to provide their employees with insurance benefits.

- Conducted a successful Proof of Concept (PoC) identifying the benefits of using a Generative AI tool for ETF developers and middleware technical staff. The PoC demonstrated increased productivity in several areas, including code documentation and code generation. The tool will be implemented in early 2025 along with guidelines and procedures for it's appropriate use.

- Migrated 11 applications to the new Web Hosting Platform. Implementation included migration to the new code source repository as well as minor updates to the applications for security purposes.

- Developed hundreds of IAS test scenarios and scripts for end-to-end testing which will begin in December.

- Released the Pension Administration System Request for Proposal (RFP) and received vendor responses.

- Developed a third-party risk assessment framework allowing ETF to enhance our resilience, maintain compliance and safeguard operations from potential disruptions or security breaches caused by external parties.

- Completed the validation, documentation, and further implementation of security controls within the agency technology infrastructure. Additionally, this progress was reported to agency and state leadership.

OTHER NOTEWORTHY ACCOMPLISHMENTS. This includes Insurance Program, Administration, Compliance, and Policies.

- Analyzed and recommended a new Wisconsin Deferred Compensation (WDC) participant administrative fee structure to the WDC Board. The new fee structure better aligns with costs of the program, will reduce volatility of fees year to year, and simplifies the current structure. The new structure will be used in setting fees for 2025 and beyond.

- Reviewed and scored proposals for the following RFPs currently issued for insurance products:
  - Medicare Advantage/Medicare Plus
  - Pharmacy Benefits
  - Pre-Tax Savings

  The committees for the Medicare Advantage/Medicare Plus and Pharmacy Benefits RFPs have each developed final recommendations that will be shared at a special January Group Insurance Board meeting.

Insurance Program:

- Issued financial reports for the Wisconsin Retirement System (WRS), Retiree Life Insurance, and Supplemental Health Insurance Conversion Credit programs as of, and for the year ended, December 31, 2023. The reports include the program's financial statements, related notes, and unqualified ("clean") audit opinions.

- Issued Employer Schedules for the WRS, Retiree Life Insurance, and Supplemental Health Insurance Conversion Credit programs as of and for the year ended December 31, 2023. These schedules are provided to employers to assist them in meeting their financial reporting requirements in accordance with Governmental Accounting Standards Board principles.

Open Enrollment:

- Completed the 2024 Open Enrollment with the following metrics:
  - Member transaction volume was lower than usual due to the lack of significant changes in health plan offerings. During the same reporting

period last year, there were approximately 10,375 Open Enrollment transactions processed compared to the 5,073 processed this year.

o The Member Call Center showed improved metrics compared to the same reporting period last year. The average speed of answer decreased by 30% partly due to the limited health plan changes taking place and a slight increase in staffing, leading to shorter talk times. Staff answered 15,597 calls, a 2% increase over 2023.