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Correspondence Memorandum

Date: January 19, 2021
To: Group Insurance Board
From: Wade Whitmus, Project Manager
Office of Strategic Health Policy
Subject: Annual Project Plan Performance Statistics

This memo is for information purposes only. No Board action is required.

Background

Each year, Employee Trust Funds (ETF) operates the Its Your Choice (IYC) project to facilitate annual open enrollment with members. This project touches 17 functional areas of ETF, involves more than 60 employees, and 3,100 hours of staff time. The project's work affects employers and members, as well as involving Office of Strategic Health Policy (OSHP)-administered health plans and programs. All project work must be completed by the middle of September, in advance of the open enrollment period kickoff. This annual project requires firm deadlines and orchestration of numerous work streams.

Open enrollment is an annual period when existing state and local employees can review their health plan coverage and pre-tax spending accounts to determine their elections/participation for the following plan year. Although not an official part of open enrollment, Supplemental Plans and the Life Insurance program leverage this annual activity to promote enrollment in or changes with existing elections.

Project Metrics

In 2018, as part of an overall IYC project restructure effort, ETF established project metrics to monitor and track key deliverables and outcomes. With experience, the metrics evolved so they are representative of work team performance and tell the "story" of how the project performed. Throughout the year, ETF monitors and updates these metrics. At the end of the project, the project team reviews the metrics to reflect and identify opportunities for future process or performance improvement.

Two areas segment the IYC project metrics. The first area tracks Project Activities (deliverables or key action items). These metrics are divided across general project and several functional work teams. Each work team has at least three metrics (deliverables). The second segment reports Project Outcomes. These metrics are specific to key

Reviewed and approved by Eileen K Mallow, Director, Office of Strategic Health Policy

Electronically Signed 2/2/21

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functional areas or activities with the project. They compare current year statistics with two prior years in order to generate trends.

Metrics key results include:

1. On-Time: Was the project activity's planned outcome completed on time?
2. Complete: Was the project activity completed as expected, or was rework or a fix required?
3. Trend: Percentage change between current year to prior year.
4. Indicator: Is the result trend positive or negative?

The value of establishing and maintaining project metrics comes from having key information on one page that presents project activities and a three-year view of project outcomes performance. The 2021 IYC Project Metrics are attached to this memo for reference.

Project Activities Metric Trends

The following is a summary of the project's activities, metrics, and trends year-over-year. This table includes number of late deliverables (metrics), and complete (no rework incidents noted).

Metric Result		IYC Open Enrollment Year		
		2018	2019	2020
Late Deliverables	#	8	4	5
	%	34.8%	17.4%	23.8%
Complete	#	17	19	20
	%	73.9%	82.6%	95.2%

The three-year trend indicates performance improvement by the project team.

The five late deliverables for calendar year 2020 (for plan year 2021) did not have an adverse effect to the project or delay other deliverables this year. They were driven, in part, to mistiming with early project planning and a mechanical breakdown with the Decision Guides print vendor. Overall, the project metrics for 2020 are positive and illustrate timely and accurate completion of deliverables.

Project Outcomes Metrics Notables

The 2020 project outcome metrics indicate a downward trend in use of ALEX (virtual benefit consultant), ETF web site visits (health benefits pages), and member calls (health benefits topics). The project team believes the small number of program changes, coupled with a robust collection of virtual kick-off and benefit fair sessions for members and employers, resulted in fewer website visits and telephone contacts. ETF believes a contributing factor in the lower number of ALEX visits in 2020 was due to this being the third year the virtual benefit counselor was available to members. ALEX's vendor, JellyVision, shared that based on performance of their other clients, we can

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anticipate a drop in ALEX usage between years two and three. Other contributing factors include fewer ALEX promotion activities (due to COVID-19 travel restrictions), and negative perceptions from members about the tool itself. ALEX's performance last year further support the decision the Board made in November to replace ALEX with Benefits Mentor in 2021. Outside of these exceptions, the majority of project outcome metrics for 2020 continue a positive trend.

Staff will be available at the Board meeting to answer any questions.

Attachment A: 2021 IYC Project Metrics

2021 IYC Project Metrics

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Project Activities		2020 Deadline		Status	Result	
		Target	Actual		On-Time	Complete
Metric		Target	Actual	Status	On-Time	Complete
Project	Health Plans submit signed contracts	8/7/20	8/14/20	Completed		
	Web site live (<i>soft launch</i>)	9/14/20	9/21/20	Completed		
	Decision Guides delivered to ETF/Employers (<i>week of</i>)	9/14/20	9/23/20	Completed		
	Decision Guides mailed to Members (<i>week of</i>)	9/21/20	9/23/20	Completed		
BITS	IYC rate-based code changes locked down	8/14/20	8/11/20	Completed		
	Complete testing of IYC rate changes in MEBS	9/14/20	9/22/20	Completed		
	Deploy IYC rate changes to MEBS	9/18/20	9/18/20	Completed		
ESS	ETF staff training sessions	9/11/20	9/11/20	Completed		
	Employer Kick-off session	9/17/20	9/17/20	Completed		
	Implement IYC rates update into MEBS production	9/25/20	9/23/20	Completed		
OC	Set production quantity for mailing	8/14/20	8/14/20	Completed		
	Final Decision Guide edits to printer	9/1/20	8/31/20	Completed		
	IYC Employer Bulletin (Biggie) distributed	9/10/20	9/10/20	Completed		
	Publish eLearnings on web site (released)	N/A	N/A	N/A		
OSHP	Deliver preliminary rates to BITS, ESS, and OC	8/17/20	8/21/20	Completed		
	Decision Guide edits completed and due to OC	8/20/20	8/20/20	Completed		
	Deliver DPM rates to BITS, ESS, and OC	8/26/20	8/26/20	Completed		
	Web site edits completed and due to OC	9/4/20	9/4/20	Completed		
	eLearning updates completed and due to OC	N/A	N/A	N/A		
	Distribute 88/105 tables to ESS and OC	9/11/20	9/11/20	Completed		
	ALEX update completed	9/14/20	9/11/20	Completed		

As Expected (1)

Not as Expected (0)

Project Outcomes		IYC Open Enrollment Periods			Result		
		2018	2019	2020	Trend	Indicator	
Metric		2018	2019	2020	Trend	Indicator	
BITS	Total number of IYC RAMS tickets generated	N/A	N/A	17	N/A	N/A	
	Number of IYC RAMS Tickets completed	N/A	N/A	15	N/A	N/A	
	Number of IYC RAMS Tickets completed on time	N/A	N/A	15	N/A	N/A	
	Number of IYC RAMS Tickets adjusted/changed	N/A	N/A	2	N/A	N/A	
Call Center	Number of IYC-based calls	8,445	8,355	6,998	-16.2%		
	Average wait time (<i>Minutes:Seconds</i>)	6:38	2:39	2:32	-4.4%		
	Abandonment rate	15.14%	6.79%	4.30%	-36.7%		
	Average talk time (<i>Minutes:Seconds</i>)	6:32	6:10	6:21	3.0%		
Guides	Total all calls (<i>IYC and other topics</i>)	18,297	19,632	15,352	-21.8%		
	Number produced	73,750	65,500	63,850	-2.5%		
	Initial number mailed to Employers	26,000	22,345	18,718	-16.2%		
	Initial number mailed to Retirees	36,000	28,833	29,936	3.8%		
IYC	Paper Applications mailed to Retirees	700	600	700	16.7%		
	IYC Total Enrollment	235,973	238,817	239,322	0.2%		
	IYC - Subscriber Enrollment	108,388	110,237	110,647	0.4%		
	IYC - Dependent Enrollment	127,585	128,580	128,675	0.1%		
	HDHP Total Enrollment	17,025	21,793	25,694	17.9%		
	HDHP - Subscriber Enrollment	7,344	9,381	11,026	17.5%		
	HDHP - Dependent Enrollment	9,681	12,412	14,668	18.2%		
Training (<i>attendance</i>)	Participating Local Employers	369	378	394	4.2%		
	ETF Staff Training	106	92	28	-69.6%		
	State Employer Kick-off	143	166	177	6.6%		
	Local Employer Kick-off (multiple sessions)	86	78	246	215.4%		
	Local Employer Q&A Session	N/A	N/A	60	N/A	N/A	
	Member ETF Health Benefits	N/A	N/A	1,796	N/A	N/A	
	Employer Meet the Vendor	N/A	N/A	497	N/A	N/A	
	Member Meet the Vendor	N/A	N/A	1,383	N/A	N/A	
	Web (<i>including eLearnings</i>)	eLearning video views - <i>ETF produced</i>	23,606	1,545	1,704	10.3%	
		"What's New" video views - <i>JellyVision produced</i>	6,056	5,898	1,973	-66.5%	
Average percentage of eLearning viewed		68%	74%	83%	12.3%		
ALEX volume of visits		12,300	12,540	5,362	-57.2%		
IYC home page hits		51,421	N/A	29,269	N/A	N/A	
IYC State Guides landing pages visits		64,212	39,482	20,937	-47.0%		
Local Employees/Annuitants Guide landing page visits		4,883	2,059	1,154	-44.0%		
Local Deductible Plan Guide landing page visits	3,249	3,004	1,957	-34.9%			
Local Health Insurance Guide landing page visits	1,648	378	206	-45.5%			
Local High Deductible Guide landing page visits	1,247	509	483	-5.1%			

* Campaign to date (may not be final data)

Positive Trend (1) =

Negative Trend (0) =