

ETF Strategic Plan and Modernization Update

Item 4 – Group Insurance Board

A. John Voelker, Secretary



ETF is a Benefits Administrator Governed by 5 Boards

Employee Trust Funds Board

Wisconsin
Retirement Board
& Teachers
Retirement Board

Wisconsin
Retirement
System

- \$140 billion in assets
- 8th Largest Public Pension Fund in US
- Serves over 650,000 state & local government employees, representing 1,500 employers
- Economic Value
- 85% of the annuitants reside in Wisconsin
- \$5.6 billion paid in annual annuity payments
- Administered Internally

Deferred
Compensation
Board

Wisconsin
Deferred
Compensation

- Supplemental Retirement Savings Plan
- \$7 billion in assets
- Serves almost 70,000 state & local employees
- ETF Contracts with Third Party to Administer

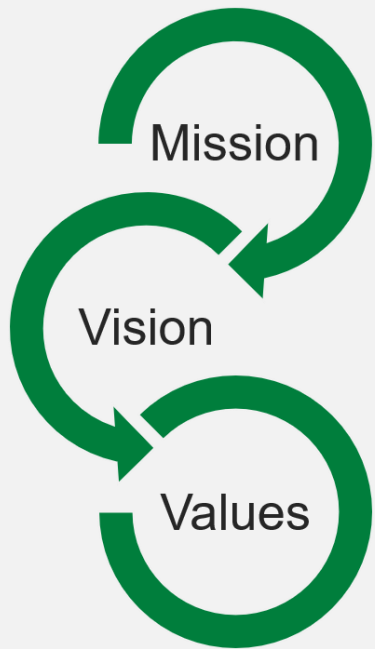
Group Insurance
Board

Health &
Supplemental
Benefits

- Health, Pharmacy, Dental, Vision, Life, Income Continuation, Disability, Accumulated Sick Leave, Pre-Tax Savings, Wellness and Other Benefits
- Serves almost 240,000 state & local employees
- Partially Administered In-house - relies on Third Party services by State, University and Local payroll & benefits administrators; as well as health plan organizations

ETF's Strategic Plan

ETF Strategic Plan Framework




**ETF's
Future State**

Goals

- Customer Experience
- Performance & Process Management
- Talented Workforce
- Modern Technologies


**Health &
Supplemental
Benefits**

Insurance Related Focus

- Enable accurate self-service and timely enrollment and eligibility administration for our customers
- Ensure insurance program sustainability
- Optimize processes to leverage capabilities of modernized activities
- Attract, integrate and advance top talent
- Modernize and Integrate systems and data

Modernization Scope - Insurance



**ELIGIBILITY &
ENROLLMENT**



**COMMUNICATION
& ENGAGEMENT**



**REPORTING &
ANALYTICS**

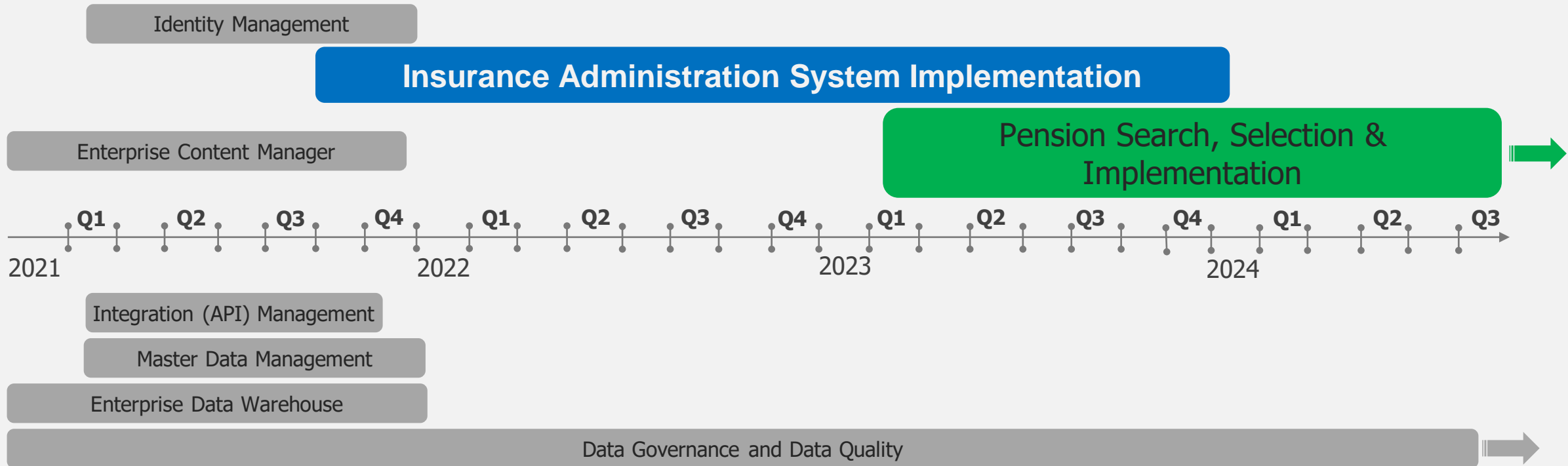


**HEALTH
INSIGHTS**



**BILLING &
PAYMENTS**

Modernization Timeline – Insurance Administration System



Modernization Timeline Relative to Insurance Planned Business Activities

Insurance Administration System Implementation

