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CORRESPONDENCE MEMORANDUM

DATE: May 24, 2013

TO: Employee Trust Funds Board
Teachers Retirement Board
Wisconsin Retirement Board

FROM: Mark Lamkins, Director, Office of Communications and Legislation

SUBJECT: Communications Update

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

ETF Modernization Initiative—During the development of the request for proposals for the new Benefits Administration System (BAS), the focus has been on internal communications to keep staff up-to-date on the multi-year modernization initiative (i.e., Transformation, Integration and Modernization or TIM). A change readiness assessment, completed in December 2012, showed that staff strongly support the changes needed to integrate business systems and to improve processes. It also identified best practices for promoting staff engagement and the exchange of information to ensure a successful implementation.

We have revamped our staff intranet site to make it more visually interesting, interactive and a source for timely information, especially as staff is located in two different buildings. Staff can link to monthly video updates about TIM progress and find other resource materials. As you may be aware, Secretary Conlin has been producing a monthly blog-style newsletter for staff to keep them informed about TIM developments and other matters of general interest. By the end of the year, this blog will be offered via the intranet to further enhance grassroots information sharing across the agency. Other communication channels include all staff e-mail, the staff newsletter, quarterly small group staff meetings with Secretary Conlin and Deputy Secretary Marchant, and informal *TIM Talk* sessions to address staff questions.

In June the agency will reach a major milestone when the BAS request for proposals is released. A part of the communications plan is identifying project milestones and outcomes, and recognizing staff contributions in achieving them. To that end, we will be having a staff picnic to recognize this milestone and all the staff who helped get us this far.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed 6/4/13

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Plans for communications to external stakeholders—members, employers, third-party administrators and constituent groups—are being further developed. Advisory councils of members and employers will be set up to collect feedback on system and process changes, and to increase awareness about new online self-service tools, functionality, and BAS portals. Much of the work of these two councils will be dependent on the selection of a BAS vendor in the fall and the vendor's project timelines for system implementation to begin in January 2014.

ETF Website—In May we launched a new content area on the website's home page for State of Wisconsin Investment Board (SWIB) monthly preliminary investment returns for the Core Fund and Variable Fund and added a prominent link to SWIB's website. During the last few months of the year we will also provide projections for annuity adjustments and effective rates based on preliminary investment returns. Members who are considering retiring at the end of the year will find this particularly beneficial. To make it more convenient for members, we have added a new subscription feature to *ETF E-mail Updates* to receive notices when investment returns are available.

Over the past several months, we have provided legislative updates on the provisions of the executive budget bill for 2013-2015 that affect Wisconsin Retirement System (WRS) benefits and programs, and how ETF administers them.

The mid-section of the website's home page is an area for special features and visual graphics. This area is often used to promote our statewide public and group educational presentations, benefits fairs, and webinars. In May we recognized the 70-year anniversary of the state's retirement system and the efforts of a group of capitol scrubwomen who advocated for it to become a reality. Beginning in June, we will highlight how making additional WRS contributions can help to boost retirement savings.

Statistics for the ETF website, etf.wi.gov, for January 1, 2013-April 30, 2013:

- Number of visitors: 147,916
- Number of visits: 276,581
- Top five downloaded forms:
 - *WRS News* (17,731)
 - *Calculating Your Retirement Benefit* (12,805)
 - *State It's Your Choice: 2013 Decision Guide* (8,008)
 - Budget Bill Summary (5,054)
 - 2013 Annuity Adjustment Press Release (3,301)

Electronic Employer Bulletins—Working with the Division of Retirement Services and Division of Insurance Services, the Office of Communications and Legislation has implemented a project to move approximately 1,500 state and local employers to paperless bulletins. The advantages include reduced postage and printing costs, reduced staff time for processing, and decreased delivery time for time-sensitive information. Beginning in June, employer agents will receive electronic bulletins via the *ETF E-mail Updates*

subscription service. Last year, ETF published 33 bulletins on a variety of topics from changes in and clarification about state and federal laws to important enrollment and eligibility information for retirement, insurance and other WRS benefits.

ETF Online Videos—ETF's online video technology, Mediasite, was upgraded this spring. The upgrade offers viewing on all mobile devices including iPad, iPhone, iPod, Android, Surface/Windows RT and BlackBerry. Viewers can now easily and quickly search the online Video Library by key words to find topics of interest. There are also options for viewers to resize windows and to adjust speed, and more robust analytics.

Statistics for member online videos for January 1, 2013-April 30, 2013:

- Total views: 12,670
- Top five viewed videos:
 - *Annual Statement of Benefits* (1,952)
 - *Your WRS Benefits* (1,763)
 - *Calculating Your Retirement Benefits Online* (1,680)
 - *Road to Retirement-Online Retirement Appointment* (1,246)
 - *WRS Payment Options* (981)

WRS News—A new “legislative spotlight” column, by ETF Legislative Liaison Tarna Hunter, first appeared in the May issue of *WRS News*. Topics in this issue included SWIB's positive financial forecast for 2013; SWIB and the Wisconsin Alumni Research Foundation create venture capital fund; distribution of *Annuity Payment Statements* for retirees and *Statement of Benefits* for active employees; and ETF's Customer Service Call Center. The next newsletter will be published in September.

We are also exploring the possibility of transitioning to a web-based newsletter in 2014 for active members. This change would allow us to target more relevant and timely communications to active members at a reduced cost. The print version of the *WRS News* would remain for retirees, although the content could be entirely focused on issues relevant to them.

Comprehensive Annual Financial Report (CAFR)—The Office of Budget and Trust Finance, and the Office of Communications and Legislation have compiled all financial data, statistics and narrative for the 2011 CAFR, year ended December 31, 2011. Content has been approved by the Legislative Audit Bureau and is being formatted for the published report, which should be available at the end of June. The 2012 CAFR is currently in production with a projected publish date in the late fall.

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