



STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

801 W Badger Road
PO Box 7931
Madison WI 53707-7931

1-877-533-5020 (toll free)
Fax (608) 267-4549
<http://etf.wi.gov>

CORRESPONDENCE MEMORANDUM

DATE: March 5, 2014

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

FROM: Mark Lamkins, Director, Office of Communications

SUBJECT: Communications Update

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

WRS Effective Rates and Annuity Adjustments

At the end of February the Department of Employee Trust Funds (ETF) announced Core and Variable annuity increases for retirees of the Wisconsin Retirement System (WRS). The below annuity adjustments are effective April 1 and will be reflected in May 1 annuity payments. The effective rates will be reflected in active/inactive employees' annual *Statement of Benefits* to be sent out in April.

	Core Fund	Variable Fund
2013 SWIB Investment Return	13.6%	29.0%
Effective Rate (applied to employees' account balances)	10.9%	31%
Annuity Adjustment (for retirees)	4.7%	25.0%

In the press release issued by ETF, Secretary Conlin acknowledged the State of Wisconsin Investment Board for its due diligence: "SWIB's strong investment performance not only allows the WRS to provide increases for retirees, it also helps maintain solid funding and hold down contribution rates for public employers and their employees."

Resources for Members

To assist members in better understanding how investment returns affect their WRS benefits, there are many resources available on the ETF website such as interactive learning opportunities, brochures, fact sheets and frequently asked questions.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Electronically Signed 3/11/14

Board	Mtg Date	Item #
JM	3.27.14	4D

The live webinar, *WRS Effective Rates and Annuity Adjustments*, will be offered throughout the month of March and continue through the spring. An ETF benefits specialist talks about how rates are calculated based on investment returns by SWIB and actuarial factors. Participants can also ask questions. Members can register for this 30-minute webinar online or by calling the Customer Service Call Center. An updated on-demand video, covering similar information, will be released in mid-March. Viewers can learn at their own pace, e-mail questions and watch presentations any time in ETF's online video library. Both the webinar and video include a participant satisfaction survey.

How do members find out about these resources? Information on statewide benefit presentations, group appointments, benefit fairs, webinars and online videos is available on the ETF website, in the *WRS News* three times per year and to subscribers of *ETF E-mail Updates*. The Department also coordinates communications to active employees through the WRS employer agent network and to retirees through outreach to constituent and advocacy groups.

Web and Video Statistics

ETF Website—There were increases in both unique visitors and number of visits in 2013 compared to 2012.

	Unique Visitors	Number of Visits	Web Pages
Jan. 1-Dec. 31, 2012	377,109	716,511 (1.9 visits per visitor)	2,288,221 (3.19 pages per visit)
Jan. 1-Dec. 31, 2013	430,419	821,497 (1.9 visits per visitor)	2,435,823 (2.96 pages per visit)

The top five downloaded publications in 2013, in order of number of hits, include:

- *Calculating Your Retirement Benefits* (ET-4107)
- *It's Your Choice: 2014 Decision Guide – State Employees* (ET-2107d-14)
- *It's Your Choice: 2013 Decision Guide – State Employees* (ET-2107d-13)
- Important Changes section from 2014 Decision Guide – State Employees
- *WRS News*, January 2013 issue (ET-7402)

Online Video Library—For January 1-December 31, 2013, there were 38,648 views of 66 different presentations in ETF's online video library. The most watched presentations, by topic and number of views, include:

- *Calculating Your Retirement Benefits Online*—4,259
- *Annual Statement of Benefits*—3,766
- *Your WRS Benefits*—3,439
- *Road to Retirement – Online Retirement Appointment*—3,213
- *When Should I Retire?*—3,005
- *WRS Payment Options*—2,292

- *2012 Preliminary Investment Returns and Rate Projections*—2,160
- *Additional WRS Contributions*—1,765
- *Social Security Retirement Benefits*—1,541

Other Updates

WRS News, May 2014 issue—In this issue of *WRS News*, the WRS effective rates and annuity adjustments for the Core Fund and Variable Fund will be covered as follow-up to the distribution of the annual *Statement of Benefits* (March) and the *Annuity Statement Mailer* (April). In addition to other topics, there will be an overview of the high-deductible health plan and health savings account option for state employees that is to be offered by the Group Insurance Board beginning January 1, 2015, as required by 2013 Act 20.

ETF E-mail Updates—In addition to e-mail notification, text messaging will soon be another option for members who subscribe to *ETF E-mail Updates*. The new mobile device service will be added this summer and promoted to all members and the current 32,350 subscribers.

Internal Blog for ETF Staff—The Office of Communications and Human Resources will be launching an internal blog, called the ETF Community, this spring. The goal is to create an interactive and collaborative work environment for staff to access and share relevant business-related information, to strengthen collegial relationships, and to increase awareness of individual contributions. Providing another way for staff to connect is especially beneficial as staff, who are located in two buildings, are assigned to cross-functional project teams to support ETF's modernization efforts and other initiatives. The internal blog is also a part of ETF's evolution as it develops a social media policy and strategies for targeted outreach to members and other stakeholders.

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