



STATE OF WISCONSIN
Department of Employee Trust Funds
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CORRESPONDENCE MEMORANDUM

DATE: November 20, 2015
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.

2015-2019 Strategic Plan

The enterprise-wide strategic plan vision and goals for the next four years were presented at the Joint Meeting of the Boards in September. (See attachment.) At the foundation of our vision of the future are four strategic focus areas/pillars:

- Financial Stewardship
- Quality and Value
- Innovative Solutions
- Customer Engagement

ETF business areas are finalizing strategic objectives and initiatives in the fourth quarter of 2015 for approval by the agency's Leadership Team. SMART methodology (Specific, Measurable, Attainable, Results-based, Time-bound) is being used to ensure initiatives are realistic, manageable and focused on short- or long-term success. We also set up an internal SharePoint site to develop and track status of different tasks, collaboration, standardized reporting and ongoing engagement with staff.

EMPOWER Campaign

This fall [EMPOWER](#) won two awards:

- 2015 Innovator Award, from *Pension & Investments* magazine and the Defined Contribution Institutional Investment Association; and
- 2015 Diversity Award, from the State Council on Affirmative Action

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Electronically Signed 12/2/15

Board	Mtg Date	Item #
JM	12.10.15	4D

The campaign also offered a variety of educational programming opportunities to engage stakeholders, including six different workshops and/or webinars and the Financial Fitness Checkup online survey. A [promotional video](#) designed to encourage involvement in the Financial Fitness Checkup was developed and distributed to all active employees.

About the Financial Fitness Checkup: Users (WRS members, family members and friends) could access the confidential survey 24/7 from any computer or mobile device throughout the month of November. Individuals who completed the 10-minute survey received personal financial wellness and knowledge scores and helpful online resources. Preliminary statistics show that 8,600 individuals completed the survey. For employers, ETF will provide aggregate data so that the agency can design workplace financial wellness programs based on employees' needs. The survey was developed in partnership with the Department of Financial Institutions, the Department of Administration, the Governor's Council on Financial Literacy and the state's Employee Assistance Program (LifeMatters).

It's Your Choice Year-Round

On a weekly basis throughout the month-long open enrollment period for [It's Your Choice 2016](#), which ended October 30, members were sent the It's Your Choice e-alert on health and wellness topics. New subscribers of the e-alert increased by more than 800 within several weeks. Members can subscribe via *ETF E-mail Updates*.

Replacing the *It's Your Benefit* printed newsletter, the new e-alert is a part of ETF's year-round communications strategy to increase member awareness and access to important and timely health insurance benefits and information. The e-alert will be sent at least monthly—more frequently if needed during peak times such as open enrollment.

WRS News Online

The top three viewed articles of interest for the September and November issues of *WRS News Online* for active employees, based on click rate, were:

September

- [Health Insurance Program Changes for 2016](#)
- [Contribution Rates to Decrease in 2016](#)
- [Legislative Update](#)

November

- [When Should I Retire?](#)
- Financial Fitness Checkup (online survey)
- [Legislative Update](#)

The January 2016 edition marks the one-year anniversary of the e-newsletter format. We plan to include a survey to collect member feedback on topics of interest and satisfaction with content, design and other aspects of the newsletter.

User Engagement Metrics for September-November 2015

- *ETF E-mail Updates* – 65 emails; 42,407 total subscribers
- Twitter – 106 tweets; 38,500 impressions; 197 total followers
- ETF website – Metrics by month: (*Note: Increase in October during It's Your Choice 2016 open enrollment.)

Month	Unique visitors	Number of visits	Pages
Sep-15	48,104	99,539	347,144
*Oct-15	72,314	167,598	938,481
Nov-15	34,774	66,469	214,495

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

Attachment: ETF 2015-2019 Strategic Focus Areas & Goals



Our Mission

To develop and deliver quality benefits and services to our customers while safeguarding the integrity of the Trust.

Our Vision

We will be a leader among public employee benefit systems by focusing on the well-being of our members through financial stewardship, high-quality and valued services, innovative solutions, and customer engagement.

Our Values

Integrity

Respect

Quality

People



2015-2019 Strategic Focus Areas & Goals



1. Enhance compliance with industry financial and accounting standards, federal and state laws, agency rules, policies and procedures.
2. Administer program benefits and services that are sustainable for our members and employers.



3. Employ business practices that incorporate documentation, testing, evaluation, and risk management.
4. Expand metric-based decision making to contain costs, maximize quality, and add value for our customers.



5. Optimize business processes and systems that must be integrated, secure, and flexible.
6. Develop and implement a secure, intuitive benefits administration system that empowers our customers to access online benefits information and self-service tools.



7. Provide information and education, accessible services, and interactive communications to meet customers' needs.
8. Foster a diverse and skilled workforce that is adaptive, collaborative, forward-thinking, accountable, and productive.