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**Correspondence Memorandum**

**Date:** March 17, 2017  
  
**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.**

**Statement of Benefits**

In April when members receive their annual *Statement of Benefits*, they will find an easy-to-follow cover letter that calls out important things to consider while reviewing their Wisconsin Retirement System benefit projections and other account information. Extra forms have been removed and replaced with leading questions and what to do:

- Is your contact information accurate?
- Are your reported earnings, years of creditable service and employee contributions accurate?
- Is your primary beneficiary designation(s) accurate?
- How is your retirement benefit calculated?
- How can you get your official retirement benefit estimate from ETF?

The streamlined packet is designed to help improve the overall customer experience by providing the most relevant information. Information will increase awareness about WRS benefits and planning ahead for retirement, and steer members to ETF website resources (e.g., forms, online calculators, educational offerings). Of course, members are also encouraged to call us if they need assistance.

In addition, we plan to rollout a new section on the ETF website in April, which will include an interactive statement with pop-ups describing contents, frequently asked questions, and links to webinars, eLearning, the full *Explanation of Statement of Benefits*, and other forms.

All of this is a precursor to future member online services offered by myETF, the agency's new benefits administration system. With myETF Rollout 2 after January 1, 2018, members will be able to log in to the secure system for the first time and update

Reviewed and approved by Pamela Henning, Assistant Deputy Secretary

Electronically Signed 3/22/17

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their contact information and beneficiary designations, as well as access other limited services. The data source for statements will be transitioned from the agency's legacy systems to myETF, which will make it possible to distribute statements by direct mail for active employees. myETF Rollout 2 also offers members the opportunity to opt out of receiving paper copies of statements as this information will be available online.

### **Our WRS: Strong for Wisconsin**

Increasing awareness and understanding about the impact of the WRS is inherent in the agency's engagement strategy for legislators, advocates, constituent groups and the media. Last year we rolled out the [Government Relations](#) section of the ETF website as a resource for this target audience as well as members. The site tracks state and federal legislation that affects ETF and the WRS, and provides relevant research, studies and more.

We continue to develop communication tools and resources for stakeholders, such as the new brochure, [Our Wisconsin Retirement System: Strong for Wisconsin](#). The brochure is being rolled out in conjunction with the Board's meeting in March.

The brochure provides a high-level overview of the WRS – using friendly language to describe complex concepts and easy-to-grasp facts, statistics and colorful infographics. Pictures and testimonials of “real” members showcase the crucial health, education, safety, transportation and other services provided by public employees.

### **User Engagement Metrics for December 2016-February 2017**

- [ETF E-mail Updates](#) – 71 emails sent; 81,908 total subscribers.

Members, employers and other stakeholders can subscribe to *ETF E-mail Updates* (via GovDelivery) on retirement, health and other WRS benefits. Almost half of the total subscribers include emails collected from webinar registrations and the Call Center.

- Twitter [@WI ETF](#) – 120 tweets; 73,400 impressions; 521 total followers.

Top viewed tweets were on the Financial Fitness Challenge, webinar on returning to work after retirement, and the EMPOWER campaign receiving the Gladfelter Award. Impressions increased by 6%, which correlates with the high-volume of media coverage during the same period on self-insurance and the exclusion of gender reassignment services. We also gained 87 new followers.

- ETF Website, [etf.wi.gov](#) – Please see Attachment A for website trends, including a comparison of unique visitors, number of visits and viewed pages. There was a 23% increase in the number of visits for this quarter compared to the same time a year ago and a slight decrease from the previous quarter (September-November). Typically each year there is a spike in web traffic during September-November because members and employers are going to the website for

information about the It's Your Choice open enrollment period for health insurance.

Website trends for calendar years 2014-2016, on page 2 of Attachment A, show an overall significant increase in web traffic each year since 2014. Not surprising, spikes are in March when annuity adjustments are announced and in the fall during the It's Your Choice open enrollment period for health insurance. There is a significant decrease of 36% in the number of visits in October 2016 compared to October 2015. The drop in site visits during this time is likely due to fewer health benefit changes announced during open enrollment for the 2017 benefits year.

### Other Updates

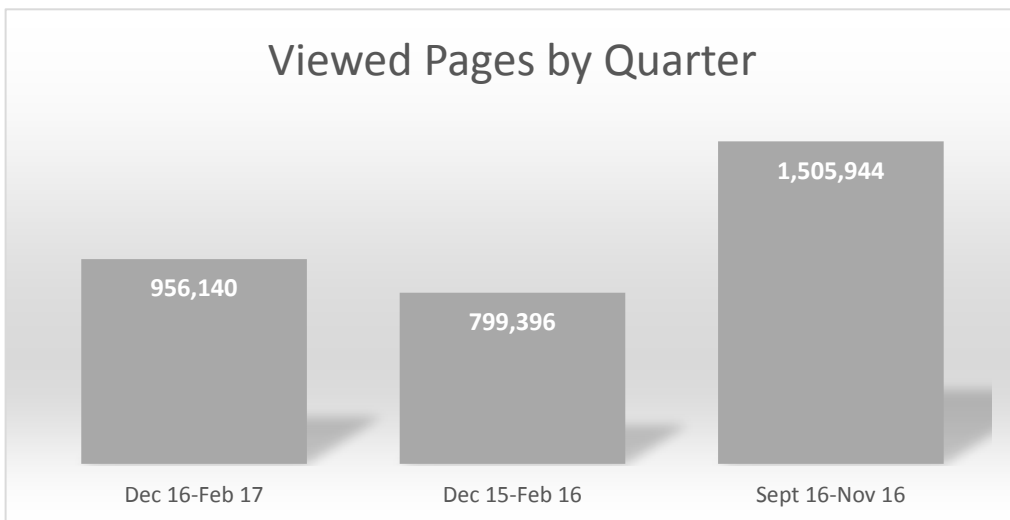
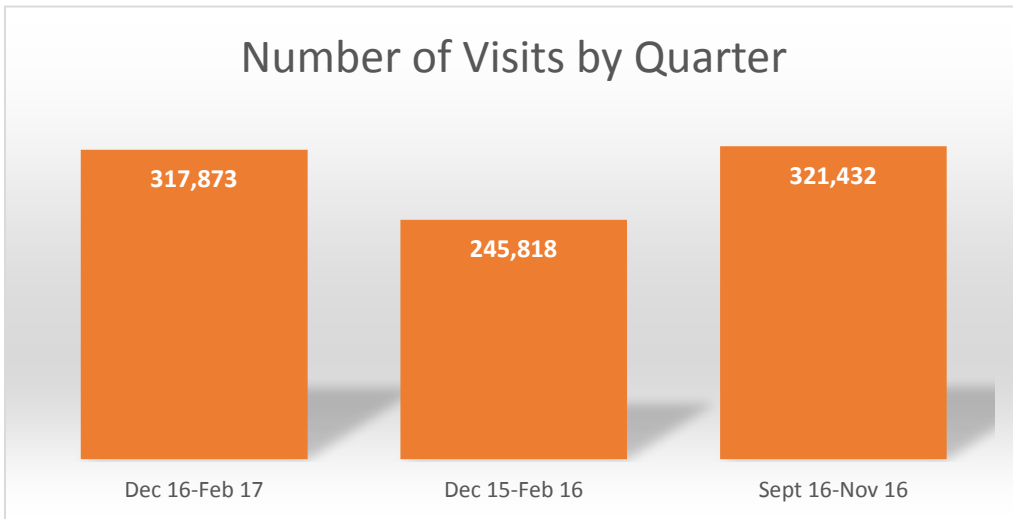
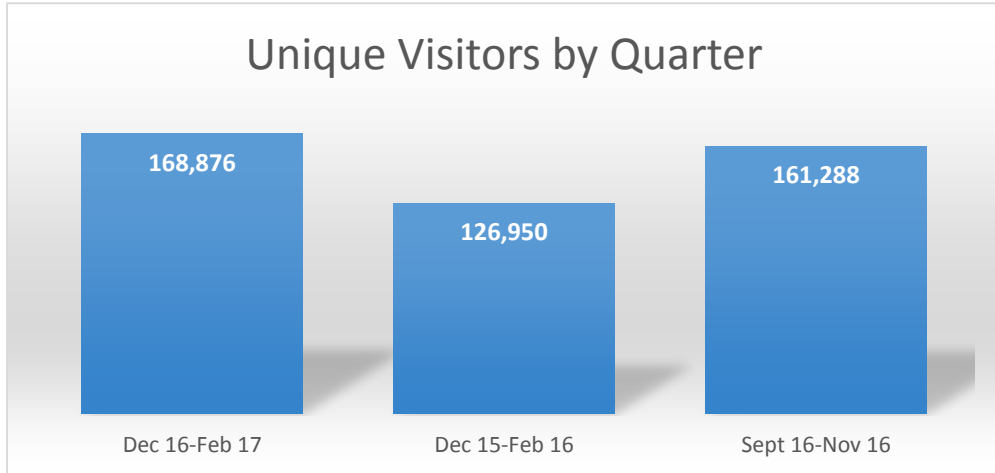
- **Annuity Adjustments** – ETF announced annuity increases for the nearly 200,000 retirees of the WRS earlier this month. The Core annuity adjustment is 2.0% and the Variable annuity adjustment is 4.0%, effective May 1.
- **Group Presentations** – Secretary Conlin presented at the Professional Fire Fighters of Wisconsin officers meeting in February in Milwaukee. We are also gearing up for annual WRS updates to constituent groups this spring.
- **Media** – ETF and the Group Insurance Board continue to experience significant traditional and social media activity surrounding self-insurance and the exclusion of gender reassignment services under the state's group health insurance program. Lisa Ellinger, Director of Strategic Health Policy, has presented on self-insurance to the UW-Madison Retirement Association and been interviewed by WisconsinEye, Wisconsin Public Television and the Milwaukee Journal Sentinel. We also continue to provide program updates to members via member newsletters, the ETF website, Twitter and It's Your Choice e-alerts.
- **Annual Financial Report** – The *2015 Comprehensive Annual Financial Report* should be sent for a final review by the Legislative Audit Bureau soon, with an anticipated publish date by the end of March.

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

Attachment A: ETF Website Trends

# ETF Website Trends, etf.wi.gov

(as of March 1, 2017)



# ETF Website Trends, etf.wi.gov (as of March 1, 2017)

