

2015-2019 Strategic Plan Update

Joint Meeting
Employee Trust Funds Board, Teachers Retirement Board
Wisconsin Retirement Board

Pam Henning, Assistant Deputy Secretary

Mark Lamkins, Director of Communications

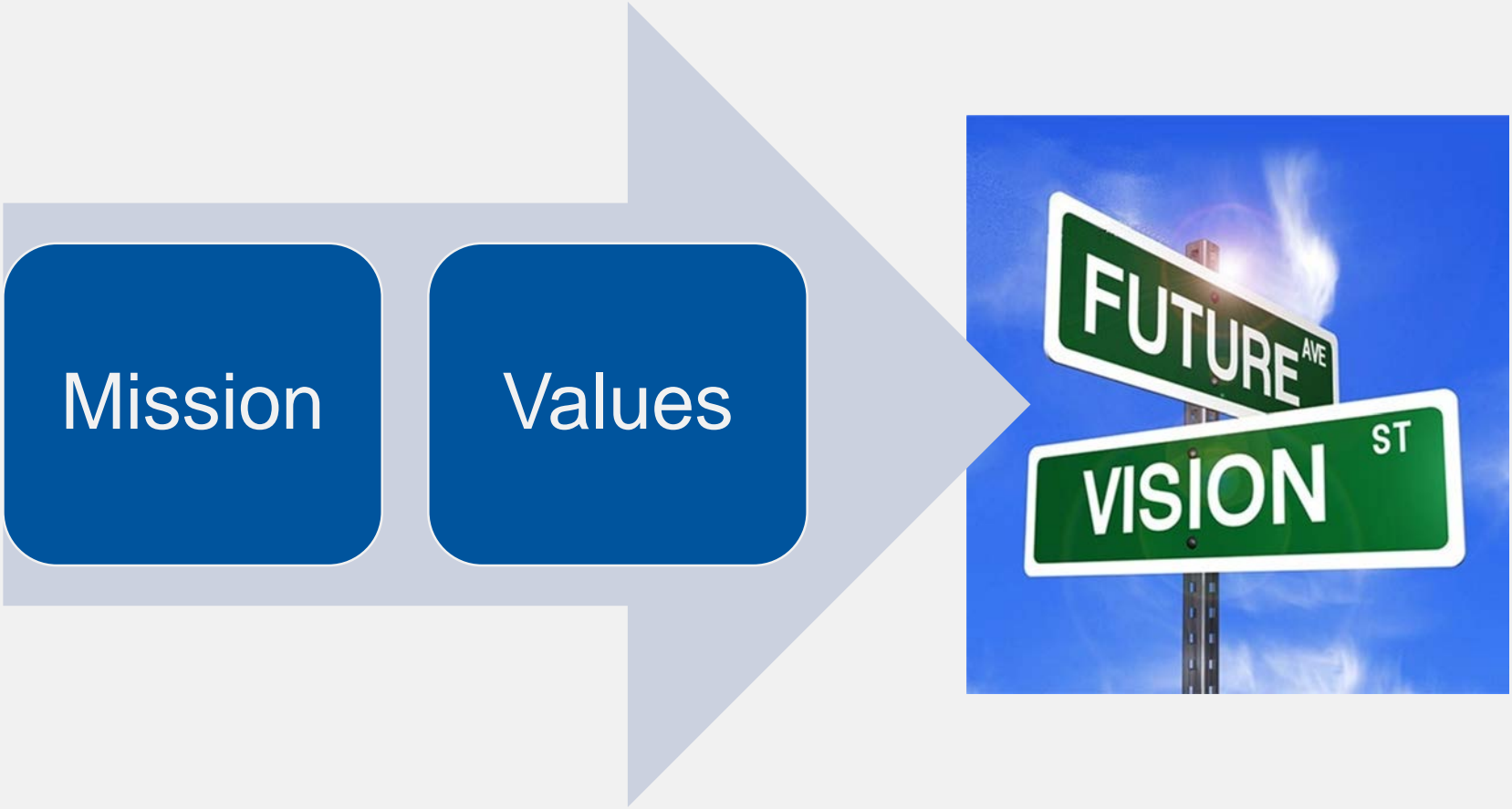


Agenda

- Mission and Vision
- Strategic Goals
- Highlights of Accomplishments for FY 2017
- Top Priorities and Highlights of New Initiatives for FY 2018

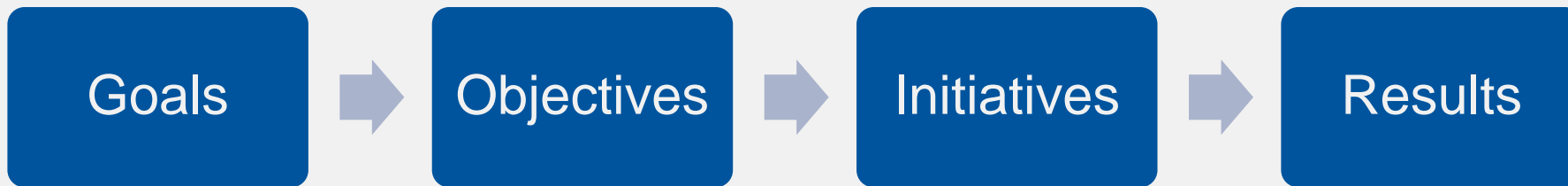


Mission and Vision



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.





Strategic Goals

Strategic 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.

Strategic Goals



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.

Strategic Goals



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.

Strategic Goals



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.



Accomplishments for FY 2017

Accomplishments



- Health benefit vendors selected to improve quality of care, outcomes and contain costs
 - Data warehouse and analytics
 - TPA for Well Wisconsin Program
 - Pharmacy benefits manager
- Evaluation and recommendations of self-insuring health benefits

Accomplishments



- Compliance with GASB 74 Accounting Standards
- Strengthened internal controls for financial transactions and reporting

Accomplishments



- Remote readiness assessment
- New audit management software
- Confidential hotline for ETF staff to report fraud, waste and abuse

Accomplishments



- Information security best practices and policies
- File share migration and backup systems with DET
- New network file structure for improved knowledge sharing, version control

Accomplishments



- Increased member accessibility to counseling services

Individual online appointment participant:

“I was happy I did not have to travel... and it felt as if I was actually meeting with the specialist in person. All my questions were answered.”

Accomplishments



- Targeted member education about saving for retirement

Financial Fitness Challenge participant:

“I found the checkup very eye-opening! It really made me think about many things, especially the need to have an emergency fund.”

Accomplishments



- Work from home policy
- Leadership Academy
- Increased staff engagement
- DiSC self-assessments



Top Priorities for FY 2018

Top Priorities

- Rolling out BAS R2 (myETF)
- Moving ETF offices to Hill Farms
- Improving the customer experience
- Supporting the ETF workforce





New Initiatives for FY 2018

New Initiatives

- Grow business intelligence
- ETF website redesign
- Enterprise staff training program
- Performance excellence assessment





Questions?

Thank you



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