

2015-2019 Strategic Plan Annual Update

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

Pam Henning, Assistant Deputy Secretary

Mark Lamkins, Director of Communications



Agenda

- Mission and Vision
- Highlights of Accomplishments for FY 2018
- Top Priorities for FY 2019
- Strategic Planning Process for 2019 and Beyond



Mission & Vision

Our Mission

- To develop and delivery 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.

Strategic Focus Areas





Accomplishments for FY 2018

Accomplishments

- Reduced duplication and complexity of WRS disability benefits
- Balanced scorecard for measuring quality and value
- Established infrastructure for growing business intelligence
- Redesigned website for Wisconsin Deferred Compensation Program
- Migrated network servers and systems hosting to DET

Accomplishments

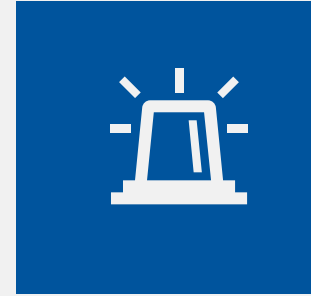
- Security Incident Response Plan



Monitor



Control



Respond

Accomplishments

- ALEX – New online virtual benefits counselor for members
 - It's personalized – Review and compare health benefit options and costs
 - It's confidential – Cloud-based tool doesn't use PII/PHI
 - It's fun – Interactive and jargon is replaced with plain language



etf.wi.gov/alex

Accomplishments

- Revamped the New Workforce Orientation
- Strong employee engagement



Accomplishments

- We moved to the Hill Farms State Office Building!





Top Priorities for FY 2019

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- Stabilize and optimize legacy systems
- Improve the customers' website experience
- Capture and improve business processes
- Identify and enhance training opportunities for ETF staff

New & Ongoing Initiatives

Stabilize and optimize
legacy systems



- BAS/myETF transition
- Monthly employer reporting
- Insurance enrollment, billing and payment

Improve the customers'
website experience



- ETF website redesign
- Member education to support customer lifecycle and learning
- Member engagement survey

New & Ongoing Initiatives

Capture and improve business processes



- Member appointment scheduling
- Holistic approach to data and reporting
- Foundation for business process redesign and lean process improvement

Identify and enhance training opportunities for staff



- Plain language to improve understanding
- Agency and job specific competencies
- Customized online trainings for staff via Lynda.com



Strategic Planning Process



Questions?

Thank you



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