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## Correspondence Memorandum

**Date:** August 22, 2018

**To:** Employee Trust Funds Board  
Teachers Retirement Board  
Wisconsin Retirement Board

**From:** Anne Boudreau, Deputy Administrator  
Division of Retirement Services

**Subject:** Retirement and Customer Service Update

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

This document highlights some of the current activities and trends in the Division of Retirement Services (DRS), such as work output and projects, and how those efforts affect customers.

### Work Volume and Production-Call Center

The number of member contacts to the call center was nearly flat, when comparing the second quarter of 2017 to the second quarter of 2018. There was a slight increase comparing year-to-date numbers from 2017 to 2018.

	2017	2018	Change
<b>Q2</b>			
Calls	45,277	43,800	-3.3%
Email	3,510	4,620	+31.6%
Total	48,787	48,420	-0.8%
<b>YTD</b>			
Calls	93,554	96,442	+3.0%
Email	7,634	8,995	+17.8%
Total	101,188	105,437	+4.2%

Reviewed and approved by Matt Stohr, Administrator, Div. of Retirement Services

Electronically Signed 9/7/18

Board	Mtg Date	Item #
JM	9.20.18	4B

## Customer Impact

For member calls to the main telephone lines (1-877-533-5020 and 266-3285), the average speed of answer for the second quarter of 2018 was 3 minutes, 18 seconds. This represents a slight improvement as compared to the second quarter of 2017, when the average speed of answer was 3 minutes, 40 seconds.

## Customer Feedback

Customer survey responses are tallied in the *ETF Operational Metrics – Performance and Workload Summary* report. However, here are specific comments from our members:

Member Charles H. wrote, “I want to say thank you...to the Service Agent who responded so graciously to my telephone call.” He described how he called to obtain information about his annuity payment. The ETF Benefit Specialist noticed he had moved to Minnesota but was still having Wisconsin income tax withheld from his annuity—and helped the member correct this.

Lori, a personal banker assisting one of our members, said the ETF Benefit Specialist was wonderful when assisting her client through a retirement application. She said, “He did a phenomenal job explaining all of the options available to the member.” She also appreciated that staff followed security protocols, such as verifying the identity of the member before releasing information.

## Trends-Retirements

The number of retirement estimate requests, retirement applications, and new retirement annuities all increased in 2018 year-to-date, when compared to the same time-period in 2017. This was also true for just the second quarter, except that the volume of retirement estimate requests was relatively flat.

	2017	2018	Change
<b>Q2</b>			
Retirement Estimates Requested	7,003	6,948	-0.78%
Retirement Applications Received	4,744	4,941	+4.2%
New Retirement Annuities Started	3,270	3,566	+9.1%
<b>YTD</b>			
Retirement Estimates Requested	13,953	14,430	+3.4%
Retirement Applications Received	7,526	8,080	+7.4%
New Retirement Annuities Started	5,711	5,815	+1.8%

## **DRS Projects and Accomplishments**

We recently revised the “Nearing Retirement” presentation for members. In response to member feedback we worked with the Office of Communications to revise and add more content, even though this lengthened the time commitment for members. Members stated they wanted more detailed information as they make the decisions about when to retire.

Further, DRS worked with ETF’s Office of Strategic Health Policy to develop employer and employee training about the state sick leave program. Among other things, brochures were updated to clarify the requirement to participate, and a three-part video series was developed to explain various aspects of the program.

ETF also reviewed the process for setting up an employer’s WRS agent, streamlining the process from the point where the agent submits the request form to the point where we issue login credentials to the new agent. The turnaround time was slimmed down from nearly eight business days to approximately two business days. The shorter process means less delay setting up a new WRS agent and ultimately, more timely reporting from the employer.

Staff will be available at the meeting to answer questions. Contact Matt Stohr at 608-266-1210 (email [matthew.stohr@etf.wi.gov](mailto:matthew.stohr@etf.wi.gov)) or me at 608-266-0758 (email [anne.boudreau@etf.wi.gov](mailto:anne.boudreau@etf.wi.gov)) with questions or comments.