



ETF's Strategic Plan Annual Update and Going Forward

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

Pam Henning, Assistant Deputy Secretary

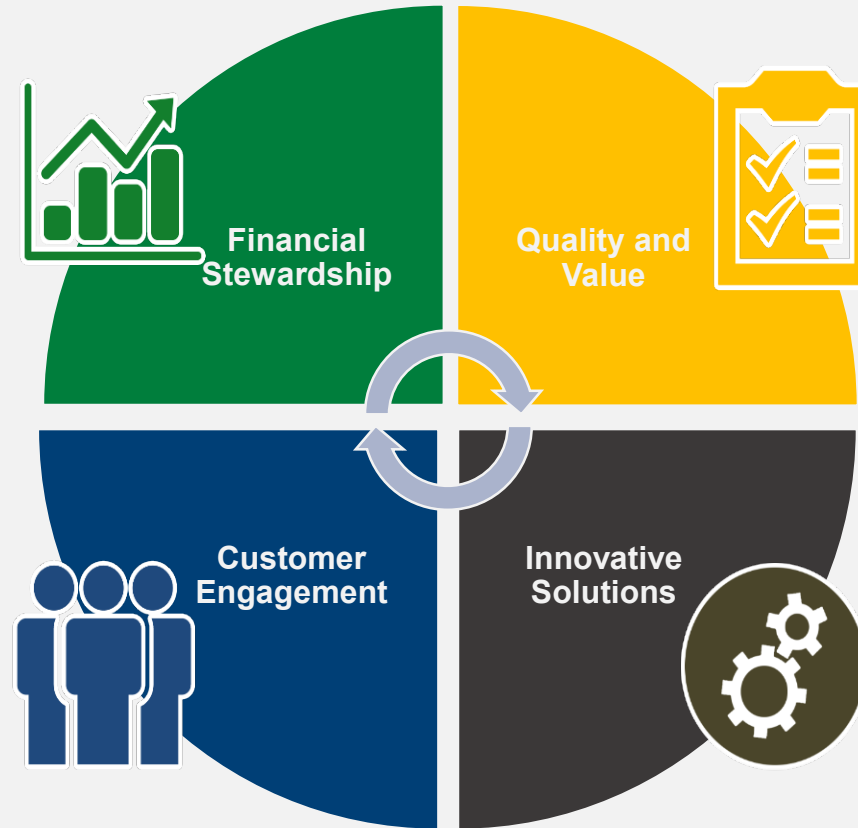


Agenda

- Overview of 2015-2019 Strategic Plan
- Highlights of Final Accomplishments for 2015-2019 Plan
- Strategic Planning Process for New Plan
- Review of Mission and New Vision
- Overview of New Plan Goals and Objectives for 2019 and Beyond

2015-2019 Strategic Plan

Strategic Focus Areas



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 2019

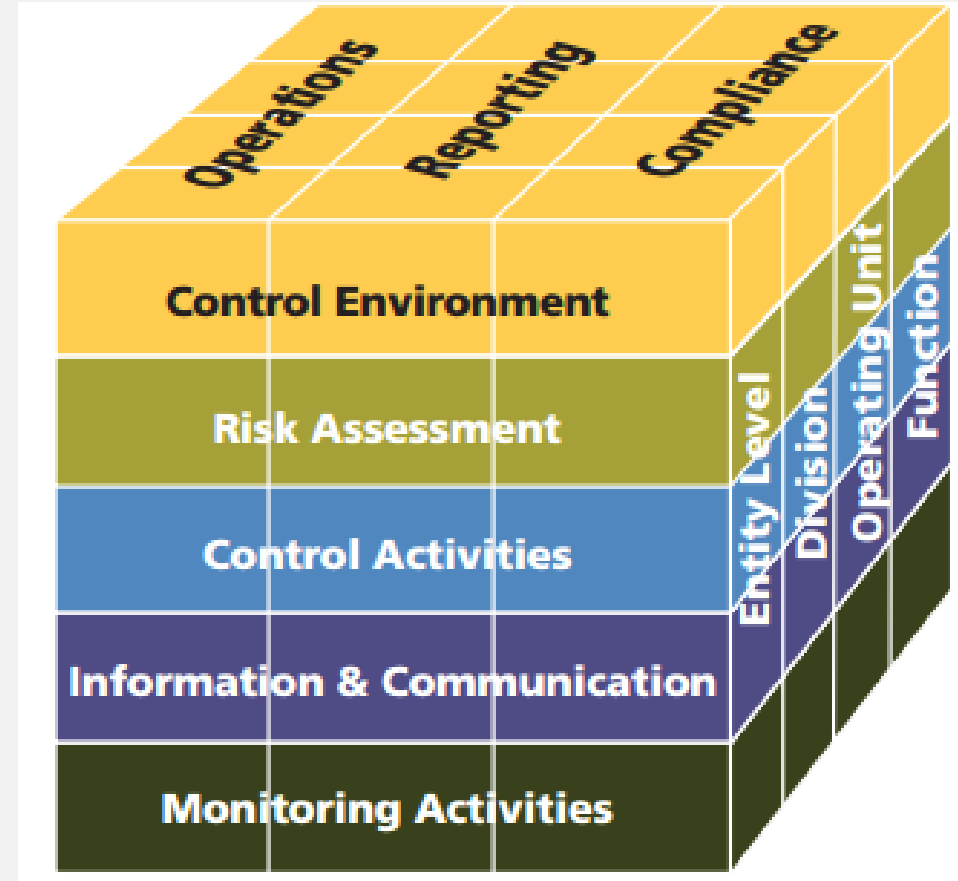
Accomplishments

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



Accomplishments

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



Accomplishments

- Migrated network servers and systems hosting to DET
- Developed Security Incident Response Plan
- Created Bureau of Information Security Management (BISM)



Accomplishments

Virtual appointments -
Increased member
accessibility to counseling
services



Accomplishments

- Reduced duplication and complexity of WRS disability benefits
- Created balanced scorecard for measuring quality and value
- Health benefit vendors selected to improve quality of care, outcomes and contain costs (data warehouse and analytics, Wellness, Pharmacy Benefits)



Accomplishments

Work from Home Policy



- ETF Employee Engagement Survey
- Leadership Academy/Emerging Leaders

Accomplishments

We moved to the
Hill Farms State
Office Building



Accomplishments



ALEX – online interactive virtual benefits counselor for members to compare health benefit options and costs

Targeted member education about saving for retirement (Empower and Financial Fitness Campaigns)



Accomplishments





Strategic Planning Process

Strategic Planning Process

- Team created Business Capability Model of all ETF business processes
- Executive Team collaborated with Leadership Team on creation of new Vision and Goals for 2019 and beyond using model as a foundation
- 3 Strategic Workgroups formed with representatives from all supervisors and managers
- Workgroups used assessment of agency business capabilities to determine maturity against people, process, data and technology
- 4 goals developed with objectives and action plans



Mission & Vision

Our Mission

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

Our Vision

- Enhance the well-being of our members by delivering expert guidance, strong, sustainable benefit programs, and an exceptional customer experience.



Strategic Goal #1



Create an effortless
customer experience.

- Objective 1:
Increase employer
competency for managing
employee benefits
- Objective 2:
Increase member
personalization for managing
their benefits

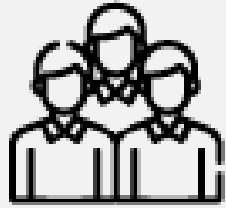
Strategic Goal #2



Implement outcomes driven performance measurement and process management.

- Objective 1:
Establish metrics to measure progress towards meeting desired outcomes of key capabilities
- Objective 2:
Establish business process management to increase knowledge, improve operational efficiencies and controls and to support innovation

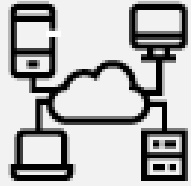
Strategic Goal #3



Build a talented and agile workforce.

- Objective 1:
Market ETF's story (or vision) to attract, integrate and advance top talent
- Objective 2:
Advance employee development through meaningful and intentional performance management approaches to empower, reward, and retain top talent

Strategic Goal #4



Implement modern,
secure and resilient
information technologies.

- Objective 1:

Develop and deploy solutions that meet customer expectations for accurate and timely services
- Objective 2:

Integrate systems and processes in order to deliver a seamless, timely and secure experience for all stakeholders

Next Steps

- Finalize action plans for each goal
- Review resource availability and prioritize
- Communicate plan and actions to internal staff
- Provide updates at future Board meetings



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Questions?

Thank you



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ETF E-mail Updates



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