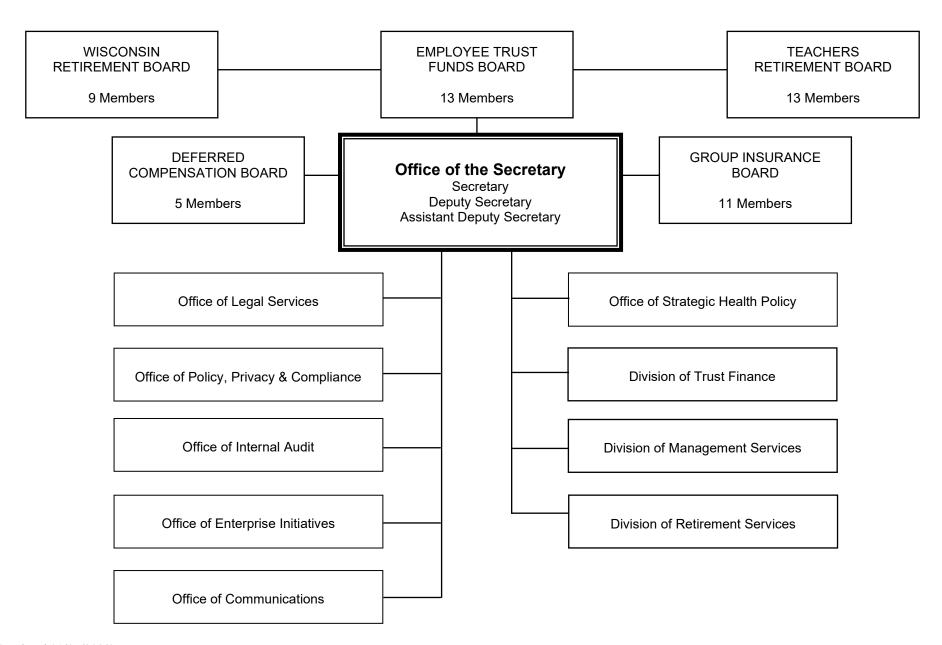
### DEPARTMENT OF EMPLOYEE TRUST FUNDS FUNCTIONAL ORGANIZATIONAL CHART January 2023



### DEPARTMENT OF EMPLOYEE TRUST FUNDS

### Office of the Secretary

John Voelker, Secretary Shirley Eckes, Deputy Secretary Pam Henning, Assistant Deputy Secretary (9.0 FTE, 9 Employees)

- Governance
- Strategic Direction
- Organization Development
- General Oversight

Tarna Hunter, Strategic Engagement & Government Relations Director

- Governmental Relations (State and Federal)
- Legislative Policy Analysis & Tracking
- Advisor to Secretary's Office and Boards on legislative issues
- Fiscal Estimate Development & Analysis
- Biennial Budget Coordination & Reporting
- Customer engagement strategies and education coordination

Kristin Gunther, Continuity of Operations Plan Manager & Policy Advisor

- Continuity of Operations (COOP)
   Plan/Pandemic Plan development
   and oversight
- Enterprise strategic planning coordination
- Team building
- Coaching and facilitation trainings
- Continuous organizational improvements and innovation

### **Staff Services Section**

- Ombudsperson services staff serve as a resource and provide assistance to participants in an effort to resolve issues that involve WRS benefit programs and reduce the number of appeals
- Board Liaisons
- Board Elections
- Executive Staff Support
- Special Meeting/Event Planning

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#### DEPARTMENT OF EMPLOYEE TRUST FUNDS

## OFFICE OF LEGAL SERVICES

Diana Felsmann, General Counsel (5.0 FTE, 5 Employees)

- Legal services for Secretary's Office, ETF staff, and the boards
- Provide legal opinions and analysis
- Respond to legal inquiries from courts, participants, attorneys, legislators, and others
- Internal revenue code compliance
- Respond to public records requests and subpoenas
- Represent ETF in administrative appeals
- Draft legislation and administrative rules
- Monitor and analyze state and federal legislation and work with Legislative Liaison on issues affecting ETF and WRS participants
- Assist Director of Communications in responding to inquiries from media, WRS participants, legislators, and others
- Respond to Notice of Claims filed by citizens against the State
- Paralegal Assistance
- Appeals Coordination

## OFFICE OF POLICY, PRIVACY & COMPLIANCE

Steve Hurley, Director (4.0 FTE, 4 Employees)

- Policy review and development
- Analysis of proposed legislation and policy
- Federal and State regulation & compliance
- HIPAA Compliance
- · Privacy policy & training
- Assistant Agency Continuity Manager (COOP)

## OFFICE OF INTERNAL AUDIT

Yikchau Sze, Director (4.0 FTE, 4 Employees)

- Staff to Audit Committee of ETF Board
- Provide risk-based and objective assurance, advice, and insight to enhance and protect ETF's values

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#### DEPARTMENT OF EMPLOYEE TRUST FUNDS

## OFFICE OF ENTERPRISE INITIATIVES

Michelle Baxter, Director

Stacy Parenteau, Deputy Director (14.0 FTE, 14 Employees)

- Enterprise Portfolio and Project Management
- Business Analysis
- Project Management (standards and templates
- Transition/ Change Management
- Business Process Management
- Enterprise Architecture
- Centers of Excellence (Project Management and Business Process & Analysis)

### OFFICE OF COMMUNICATIONS

Mark Lamkins, Director (4.0 FTE, 4 Employees)

- Internal and external communications
- ETF website, etf.wi.gov
- Publications and forms
- Videos and eLearning
- Graphics design and printing
- Social media
- Media/PR
- Writing, editing, and proofreading
- Employee intranet, FRED Employee blog, ETF Community

## OFFICE OF STRATEGIC HEALTH POLICY

Eileen Mallow, Director

Brian Stamm, Deputy Director (15.0 FTE, 15 Employees)

- · Primary staff to Group Insurance Board
- Staff to ETF Board (for ASLCC)
- It's Your Choice content
- Member and employer education on assigned programs
- Health Insurance, including pharmacy and dental coverage
- Medicare Advantage
- Life Insurance (State and Local, Spouse and Dependent)
- Supplemental (employee pays all) plans
- Flexible Spending Accounts (medical, dependent day care, parking, and transit)
- HSA accounts
- · Contract administration for above programs
- Departmental Determinations
- Data Analytics
- · Federal Health Policy
- · Disease Management
- Wellness

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF TRUST FINANCE

Cindy Klimke-Armatoski
DIVISION ADMINISTRATOR/
CHIEF TRUST FINANCE OFFICER

(24.0 FTE, 24 Employees)

#### **DEPUTY ADMINISTRATOR**

Marie Ruetten

- Process all financial transactions for benefit plans including contributions, benefit payments, and third party administrator invoices
- Maintain WRS member accounts
- Generate the Comprehensive Annual Financial Report

## FINANCIAL COMPLIANCE BUREAU

Amelia Slaney Bureau Director

- Financial reporting
- Actuarial reporting and analysis
- Maintain Market Recognition Account
- Calculate WRS effective rate, annuity adjustments, and contribution rates
- Tax reporting

## INSURANCE PROGRAM ACCOUNTING

- Financial reporting of insurance programs and deferred compensation
- Calculate program fees
- Process and account for insurance programs financial activity

## RETIREMENT ACCOUNTING BUREAU

Tanya Holcomb Bureau Director

- Collect WRS contributions
- Maintain WRS member and employer accounts
- Process WRS annuitant and lump sum benefit payments
- Manage accounts receivable and collections
- · WRS annual processing activities

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES

Steve Mueller
DIVISION
ADMINISTRATOR

(57.5 FTE, 58 Employees)

#### **DEPUTY ADMINISTRATOR**

Bonnie Cyganek

- · Enterprise Content Management services
- Coordination of agency records at State Records Center
- Agency Records Officer

#### **HUMAN RESOURCES BUREAU**

Lisa Dally Human Resources Director

- · Payroll and benefits
- Training
- Employee Assistance Program
- Recruitment
- Affirmative Action/Equal Employment Opportunity
- Disability accommodations
- Classification and compensation
- Employee relations
- · Internal policy development and monitoring
- · Change management
- · Health and Wellness coordination

## SUPPLIES, MAIL, & FACILITIES OPERATIONS

- Copier management and services
- Inbound and outbound mail services and distribution
- Supply and forms inventory
- Benefits pre-packet assembly and order fulfillment
- Shredding and courier service vendor liaison
- · Member address research and updating
- · Tenant liaison with landlord
- Building safety
- Physical asset inventory
- · Building access card management
- · Microfiche historical file

BUREAU OF BUDGET, CONTRACT ADMINISTRATION, & PROCUREMENT (SEE NEXT PAGE)

#### **DATA MANAGEMENT BUREAU**

Cindy Gramann Bureau Director

- Data quality
- Data governance
- Data Analytics
- Business Intelligence
- Data strategy
- Data architecture
- Master Data Management

## BUREAU OF INFORMATION SECURITY MANAGEMENT

(SEE NEXT PAGE)

BUREAU OF INFORMATION TECHNOLOGY SERVICES (SEE PAGE 8)

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES (continued)

## BUREAU OF BUDGET, CONTRACT ADMINISTRATION, & PROCUREMENT

Tim Steiner Bureau Director

- Biennial Budget
- Operating Budget
- Procurement
- Agency contract administration
- Process accounts payable invoices
- · Process travel vouchers
- Coordinate P-cards
- Develop and assist in procurements

### **BUREAU OF INFORMATION SECURITY MANAGEMENT**

Dave Maradiaga Bureau Director/Chief Information Security Officer

- · Information security strategy
- Security administration, consultation, and policy development
- Information security system administration
- · Information security training
- Information security project/initiative oversight
- · Security incident response planning
- IT disaster recovery and business continuity planning
- Information risk management program management

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF MANAGEMENT SERVICES (continued)

#### **BUREAU OF INFORMATION TECHNOLOGY SERVICES**

Dan McCarthy
Bureau Director/Chief Information Officer

Mark Robinson Deputy Bureau Director

- IT strategy
- IT plan implementation
- IT talent management & resource allocation
- IT capacity management
- IT project/initiative prioritization and support
- IT architecture

# DEVELOPMENT, DBA, & MIDDLEWARE SECTION

- · Technical architecture support
- DevOps Architecture Support
- Application server support and installation
- Web Server support and installation
- Application Deployment Support
- Server administration support
- Evaluate new technology services
- COBOL and Batch Development Support
- Data and Database Support Services
- Database Server Support
- Data Modeling Services
- Production and operational support services
- Evaluate new technology services

### DEVELOPMENT & QUALITY MANAGEMENT SECTION

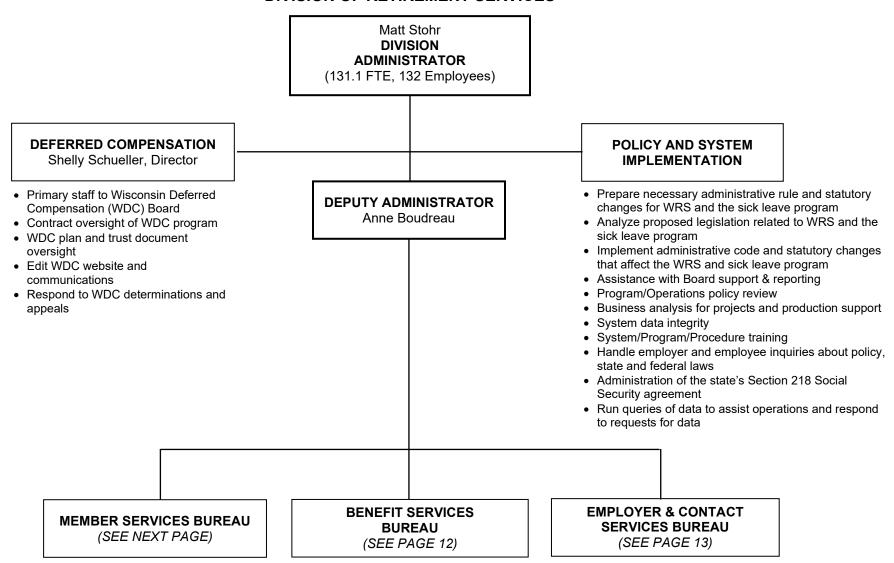
- · Quality assurance and testing
- Re-engineering projects, support, and solutions
- Technical change management
- Life cycle analyses for custom-developed systems
- Software development process (i.e. SDLC)
- Enterprise Application/Systems Design
- Java Integration and Support
- Application Integration Architecture, Development and Support
- Feasibility studies and design analysis
- Technical architectural support
- Software technical design architecture standards
- Production and operational support services
- · Custom applications development and support
- UX analysis, design, and assessment
- Accessibility and 508 compliance monitoring and assessments
- Evaluate new technology services

### IT SOLUTIONS CENTER SECTION

- IT property asset management
- Server administration
- "Help Desk" support for all department applications
- Brokerage/liaison for DET services
- IT hardware and software procurement
- Telecommunications management
- User security and access management
- LAN, WAN, and infrastructure support and installation
- Windows Server administration
- Device imaging, configuration, and management
- Network security systems configuration
- SharePoint Administration
- · Technology integration and training

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES



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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

## MEMBER SERVICES BUREAU

Roger Fletcher Bureau Director

- One-on-one member meetings
- Conducting group retirement sessions
- Detailed explanation of WRS benefits
- Provision of account-specific information
- Calculation of benefit estimates (retirement, disability, death, service purchase)
- · Assistance with benefit application process
- Responses to calls, letters, and e-mail inquiries
- DRS staff training development and delivery
- · Oversight of virtual appointments and presentations
- Developing and delivering member focused webinars
- Develop and conduct large group presentations online and in-person
- Answer member phone calls and provide additional Call Center support
- MSB Reporting & Statistical Analysis

## RETIREMENT PLANNING & OUTREACH SECTION 1

- DRS staff training development and delivery
- Oversight of virtual appointments
- Public & private outreach presentations
- · Oversight of Benefit fairs

## RETIREMENT PLANNING & OUTREACH SECTION 2

- Maintain content of forms and brochures
- · Process daily mail from members
- · Coordinate SWAT activities

## RETIREMENT PLANNING & OUTREACH SECTION 3

- Death review- Use Berwyn to ID death of inactive & lost contact members
- Abandoned accounts
- · Visitor check-in
- · Quick service

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

## BENEFIT SERVICES BUREAU

Jim Guidry Bureau Director

Gene Janke Deputy Bureau Director

### BENEFIT INITIATION SECTION

Calculations, eligibility determination, and processing related to the following:

- Estimated and final monthly annuities
- Lump sum retirements
- Annuity corrections
- Separation payments
- Non-annuitant death and special active death benefits
- Joint Survivor benefits
- Beneficiary payments
- Required distributions
- Certify life insurance coverage for retirees
- Reciprocity
- Various payment related actions (e.g. stop payments and reversals)
- Rehired annuitants

### DISABILITY PROGRAMS SECTION

- Benefit administration for disability programs
- §40.63 Disability Retirement Program
- §40.65 Duty Disability Program
- Disability case management and claim processing
- Disability retirement calculations and annuity corrections
- Duty disability calculations and benefit adjustments
- Coordination of benefits

## DISABILITY POLICY ANALYSTS & BUREAU SMEs

- Primary staff to Group Insurance Board (for ICI and LTDI programs)
- Primary staff to Teachers Retirement, Wisconsin Retirement and Employee Trust Funds Boards (for §40.63 and §40.65 disability programs)
- Income Continuation Insurance (ICI) (short and long term)
- Long-Term Disability Insurance (LTDI)
- Policy Review and Development
- Contract administration
- Departmental determinations

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## DEPARTMENT OF EMPLOYEE TRUST FUNDS DIVISION OF RETIREMENT SERVICES (continued)

## EMPLOYER & CONTACT SERVICES BUREAU

Kathy Wienkes Bureau Director

Alene Kleczek Deputy Bureau Director

### BUSINESS & POLICY ANALYSTS & BUREAU SUPPORT

- Projects
- Employer compliance
- Data Integrity
- Operational support
- Research and report system issues, enhancements, or requirements
- Full file comparison (FFC)

## CONTACT MANAGEMENT SECTION, UNITS 1 & 2

- Explanation of WRS, insurance and other benefits
- Provision of account-specific information
- Assistance with benefit application process
- Responses to member calls and e-mail inquiries
- Appointment booking
- Process member beneficiary designations
- Process retiree address and ACH changes

## EMPLOYER SERVICES SECTION

- · Employer Training and Outreach
- Employer administration manuals & forms

#### **WRS UNIT**

- Employer communication center for WRS questions
- Employer ETF email updates
- WRS annual earnings reconciliation
- Employer invoicing: WRS
- New employer processing: WRS
- myETF Benefits System Administration (business side)

#### **INSURANCE UNITS 1 & 2**

- Employer communication center for insurance questions
- Health insurance applications and eligibility issues
- Maintenance of sick leave conversion credit accounts
- Annuitant & continuant health insurance administration
- Maintaining BPS insurance deductions and reconciliation
- Retiree Medicare enrollment requirements
- Employer invoicing: health insurance
- New employer processing: health and life insurance; ICI
- It's Your Choice Coordination

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