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
DEPARTMENT OF EMPLOYEE TRUST FUNDS

<table>
<thead>
<tr>
<th>OFFICE OF LEGAL SERVICES</th>
<th>OFFICE OF POLICY, PRIVACY &amp; COMPLIANCE</th>
<th>OFFICE OF INTERNAL AUDIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diana Felsmann, General Counsel (5.0 FTE, 5 Employees)</td>
<td>Steve Hurley, Director (4.0 FTE, 4 Employees)</td>
<td>Yikchau Sze, Director (4.0 FTE, 4 Employees)</td>
</tr>
<tr>
<td>• Legal services for Secretary's Office, ETF staff, and the boards</td>
<td>• Policy review and development</td>
<td>• Staff to Audit Committee of ETF Board</td>
</tr>
<tr>
<td>• Provide legal opinions and analysis</td>
<td>• Analysis of proposed legislation and policy</td>
<td>• Provide risk-based and objective assurance, advice, and insight to enhance and protect ETF’s values</td>
</tr>
<tr>
<td>• Respond to legal inquiries from courts, participants, attorneys, legislators, and others</td>
<td>• Federal and State regulation &amp; compliance</td>
<td></td>
</tr>
<tr>
<td>• Internal revenue code compliance</td>
<td>• HIPAA Compliance</td>
<td></td>
</tr>
<tr>
<td>• Respond to public records requests and subpoenas</td>
<td>• Privacy policy &amp; training</td>
<td></td>
</tr>
<tr>
<td>• Represent ETF in administrative appeals</td>
<td>• Assistant Agency Continuity Manager (COOP)</td>
<td></td>
</tr>
<tr>
<td>• Draft legislation and administrative rules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Monitor and analyze state and federal legislation and work with Legislative Liaison on issues affecting ETF and WRS participants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Assist Director of Communications in responding to inquiries from media, WRS participants, legislators, and others</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Respond to Notice of Claims filed by citizens against the State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Paralegal Assistance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Appeals Coordination</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Updated 01/05/2023)
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
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
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
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
• Prepare necessary administrative rule and statutory changes for WRS and the sick leave program
• Analyze proposed legislation related to WRS and the sick leave program
• Implement administrative code and statutory changes that affect the WRS and sick leave program
• Assistance with Board support & reporting
• Program/Operations policy review
• Business analysis for projects and production support
• System data integrity
• System/Program/Procedure training
• Handle employer and employee inquiries about policy, state and federal laws
• Administration of the state’s Section 218 Social Security agreement
• Run queries of data to assist operations and respond to requests for data

DEFERRED COMPENSATION
Shelly Schueller, Director

• Primary staff to Wisconsin Deferred Compensation (WDC) Board
• Contract oversight of WDC program
• WDC plan and trust document oversight
• Edit WDC website and communications
• Respond to WDC determinations and appeals

POLICY AND SYSTEM IMPLEMENTATION

DEPUTY ADMINISTRATOR
Anne Boudreau

MEMBER SERVICES BUREAU
(SEE NEXT PAGE)

BENEFIT SERVICES BUREAU
(SEE PAGE 12)

EMPLOYER & CONTACT SERVICES BUREAU
(SEE PAGE 13)

DEPARTMENT OF EMPLOYEE TRUST FUNDS
DIVISION OF RETIREMENT SERVICES

Matt Stohr
DIVISION ADMINISTRATOR
(131.1 FTE, 132 Employees)

DEPUTY ADMINISTRATOR
Anne Boudreau

(Updated 01/05/2023)
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

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

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

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

(Updated 01/05/2023)