

Wisconsin Retirement System



**MATT STOHR, ADMINISTRATOR
DIVISION OF RETIREMENT SERVICES
ETF**

**2012 WCOA ANNUAL CONFERENCE
MAY 14, 2012**

WRS Hot Topics



- **WRS Annuity Adjustments-covered by ETF Secretary Conlin**
- **Implementation of recent law changes and effects on services**
- **WRS rehired annuitants**
- **ETF service levels**

Implementation of Recent Law Changes



- 2011 Wisconsin Acts 10, 32 and 133
 - In process of implementing each act.
 - Limited impact on WRS annuitants:
 - ✦ Delays in “finalized” annuity amounts
 - Finalized Disability payments
 - ✦ There aren’t any delays for monthly annuity payments
 - Service delays for active WRS members include:
 - ✦ Annual WRS Statement of Benefit
 - ✦ WRS Lump Sum/Separation Benefit payments
 - ✦ 2013 WRS Contribution Rates

WRS Rehired Annuitants



- Legislative Audit Bureau conducting audit of WRS rehired annuitants:
 - LAB survey sent to all WRS employers.
- Rehired annuitant bills introduced in 2011-2012 Legislative Session, but did not pass.

ETF Service Levels



- When compared to peers, ETF is a low cost administrator of the WRS and continually makes improvements to customer service levels-as measured by independent benchmarking firm.
- Examples:
 - Education and outreach (see next slide)
 - Online tax calculator
 - Sick leave application
 - Call Center changes: expanded hours, additional staff, etc.
 - ✦ Average 3200 calls per week, 300 emails per week
 - ✦ Nearly 5000 calls per week since Annuity Mailer was mailed

ETF Outreach Services



2009 – 2011 Outreach Program Statistics

| | # Outreach Group Appts | # Outreach Group Members | # Private/ Public Presentation Events | # Private/ Public Presentation Members | # Madison Group Appts | # Madison Group Members |
|--------------|------------------------|--------------------------|---------------------------------------|--|-----------------------|-------------------------|
| 2009 Jan-Dec | 47 | 581 | 63 | 6,005 | 193 | 1,601 |
| 2010 Jan-Dec | 58 | 812 | 74 | 5,549 | 188 | 1,841 |
| 2011 Jan-Dec | 287 | 2,366 | 87 | 8,661 | 273 | 1,574 |

2011 Outreach Group Session Statistics by District

| District | # of Group Appts | # of Total Members | Avg # of Members per Appt | Total Appt Slots Available | Hours Spent in District |
|----------------|------------------|--------------------|---------------------------|----------------------------|-------------------------|
| SOUTHEAST | 98 | 764 | 7.80 | 1,176 | 585.25 |
| EAST CENTRAL | 28 | 234 | 8.36 | 336 | 188.25 |
| NORTHEAST | 29 | 258 | 8.90 | 348 | 204.75 |
| NORTH CENTRAL | 21 | 189 | 9.00 | 252 | 163.75 |
| NORTHWEST | 28 | 215 | 7.68 | 336 | 226.00 |
| WEST CENTRAL | 22 | 195 | 8.86 | 264 | 197.75 |
| WESTERN | 27 | 207 | 7.67 | 324 | 194.50 |
| SOUTHWEST | 23 | 202 | 8.78 | 276 | 143.25 |
| SOUTH CENTRAL* | 11 | 153 | 13.91 | 132 | 28.50 |
| TOTALS | 287 | 2,417 | 9.14 | 3,444 | 1,932 |

* Madison is in the South Central district, but groups sessions held at the ETF office are excluded from this total since these are not "outreach" sessions.

ETF Service Levels



- ETF's Division of Retirement Services processed over 18,000 retirements in 2011.
 - 9000-10,000 the "norm" for a year
- Increasing call volume and email volume.
- Increasing number of rehired annuitant investigations.
- Implementation of substantial law changes.
- Despite all of this, DRS was able to provide core services to annuitants and offer new services to meet customer demand.

Thank You



- ETF appreciates the strong working relationship with WCOA.
- WCOA does a great job helping ETF communicate about the WRS.
- Questions?