



In This Issue...

- [Fall 2011 All-Staff Meeting wrap up](#)
- [EDRO and DRO process now streamlined](#)
- [New season for PRIMs and PROs](#)
- [ORS homepage has a new look](#)
- [Business briefs](#)
- [We raised \\$1,669 for SECC!](#)
- [Detroit Free Press recognizes ORS as Go Direct partner](#)
- [Public Pension Standards 2011 Award](#)
- [Comings & goings](#)
- [Power of Perspectives update](#)
- [ING served sweets to start NS4RW](#)
- [Shoo the Flu comes to the GOB on October 28](#)
- [Annual ORS Reunion a great success](#)

Fall 2011 All-Staff Meeting wrap up

Last Tuesday's All-Staff Meeting was a great success! The open, inclusive, high-energy format was different from past meetings and, according to feedback from the post-meeting survey, staff loved it. Almost 80 percent of survey respondents said their time spent at the meeting was useful!



[Click here to check out a photo gallery of the fall ORS All-Staff Meeting.](#)

Calendar

October

EPC Brown Bag lunch	19
Public School	

Meeting recap

As ORS and AST employees entered the meeting room, they were greeted by the EPC, a slideshow of staff pictures throughout the year, and two tables full of fall treats. They were also given goodie-bags by ING.

To start the meeting off, BPLs introduced all the new faces who joined ORS since the spring All-Staff. In total, we introduced 37 new staff — 26 of them in CS. Welcome!

Board Meeting	20
Spacewalk	20
ORS Boo Day	28
Halloween	31

November

EPC Brown Bag lunch	2
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On the Horizon

- Daylight Saving Time ends
- November 6
- Veterans Day
- November 11
- EPC Brown Bag lunch
- November 16
- Thanksgiving
- November 24

Quick Links

- [ORS Member Website](#)
- [ORS Employer Website](#)

Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly (<i>EPC, BPOs, and BPLs</i>)
BPD	Benefit Plan Design
BPL	Business Process Leader
BPO	Business Process Owner
CE	Customer Education
CS	Customer Service
DB	Defined Benefit
DC	Defined Contribution
DTMB	Department of Technology, Management and Budget
EPC	Executive Process Council (<i>Phil, Laurie H, Laurie M, and Anthony</i>)
EPO	Executive Process Owner

Phil Stoddard then introduced DTMB Chief Deputy Director Phillip Jeffery who talked about the future of DTMB with a focus on agency scorecards, metric-based budget reporting, and other plans for making Michigan the best-run state government in the country. He also commented on how he's glad to have his family in a state with so much diversity and chances for growth.

Next, **Kim Marton** and **Elaine Scott** facilitated the townhall Q&A session which was hosted by Phil. The format encouraged staff to ask questions, share perspectives about office issues, and have follow-up discussions about the questions and answers published before the meeting.

Click here to view a transcript of the [townhall questions and answers](#), and make sure to check out the [EPC's answers to your pre-meeting questions](#) if you haven't already.

Next, **Laurie Mitchell** introduced the EPC's new employee-engagement initiative. Satisfied employees are happy and want to do a good job, but engaged employees are passionate, committed, and move the organization forward, Laurie said. The EPC is creating a survey to measure staff engagement and satisfaction that will be ready in November. They will measure results, identify action items, and then take action. The team will do follow-up surveys to find out if they're on the right track.

After a break for cider and donuts, **Vernique Jackson** kicked off the success celebration. Each process presented its top successes from the past year while staff clapped, used noise-makers, and danced to show their enthusiasm.

Erica Quealy then summarized the great work ORS staff did on the strategic plan refresh. Representatives from every process participated, and all of the items they recommended were accepted by the BPOs and EPC. You can find the [refreshed strategic plan and 2011-12 business plan](#) in the KL.

Throughout the year, watch the colors change on the strategic plan graphic as we make progress toward completing our goals.

To close, Phil shared the vision he has for ORS in 2012. [Click here to check it out.](#)

Thanks to the All-Staff planning team of **Lyndsay Aldrich, Amita Das, Trisha Heinze, Sara Hoppes, Vernique Jackson, Kim Marton, Robin Stremlow, and Jason Wilson** for doing a great job organizing the meeting!

Your Feedback

Thanks for the great feedback you provided in the post-meeting survey. Your input will help the Spring 2012 Planning Team make the next meeting even better!

If you're interested in being a member of the planning team in the spring, let your supervisor know and make sure to include it on the interest survey.

EDRO and DRO process now streamlined

If an active or deferred ORS member gets divorced, the court may order that a portion of the member's pension be paid to an alternate payee, such as a former spouse or dependent child. This order is known as an Eligible Domestic Relations Order (EDRO) and must be on file with ORS before a member's retirement effective date. Similarly, retired members who get divorced may submit a Domestic Relations Order (DRO) to divide the member's pension or void the chosen survivor option.

ORS typically receives 300-350 EDROs and DROs a year. Most come in with document errors and have to be returned to the member's attorney for correction and resubmission, resulting in added legal expenses, frustration for the member, and significant staff time and effort on our end.

A complete overhaul of the EDRO/DRO processes was a key feature of the recent policies and procedures efforts of CS ([see September 9 issue](#)). They joined forces

ER	Employer Reporting
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting (public school employees)
PRO	Preretirement Orientation (state employees)
PS	Process Support
SME	Subject Matter Expert
UAT	User Acceptance Testing

with staff from PS and CE, looked at the entire EDRO/DRO effort, and instituted the following process improvements:

- Estimating the effort involved in every EDRO/DRO task in order to staff the process appropriately.
- Adding a new process to filter the EDRO/DRO mail, assign it to the appropriate staff, and immediately flag any account that might be under special restraints.
- Introducing new document names which helps staff prioritize the tasks and greatly streamlines the workflow. CS is exploring other ways to use document names more effectively in other workflows.
- Reducing the number of standing paper files.
- Developing a completely new set of policies and procedures.

So far, the effort has enabled CS to maintain the standard 10-day turn around for 95 percent of EDRO submissions. The changes have also positively impacted DRO processing, which, due to their effect on payroll, must be completed for the payroll in the month after receipt.

CS also worked with CE to develop online, fillable EDRO/DRO forms. "For our customers, this means that their EDRO or DRO filing process has a greater chance of being right the first time," said **Laurie Mitchell**. "For CS, this means less staff time processing."

The real benefit, however, will be based on how well our customers and their attorneys adhere to the new fillable forms. To encourage that buy-in, CS and CE are reaching out to the Michigan Bar Association and family law organizations and watching the results closely; further review and assessment is scheduled for early next year.

All of this is the result of extensive collaboration, creativity, and hard work that came from within and outside of ORS: from CS, **Bea Barajas, Angie DeRose, Laurie Mitchell, Bill Motz, Faye Norris, Brenda Prast, and Laurie Svendsen**; from PS, **Andy Kolp, and Alice Semevolos**; from CE, **LuAnn Kern, Carolyn Parkinson, and Kathy Tober**; and from the Attorney General's office, Daphne Johnson and Tom Quasarano. Good work, everyone!

ORS Strategic Goals



- **Innovate and Improve Customer Service**
- **Best In Class Business Practices**
- **Instill Confidence in Staff Through Quality Communication**
- **Engage Top Talent to Realize Potential**
- **Continuously Renewed Business-Driven Technology**
- **Build Business Capacity Through Education and Development**
- **Proactive Policy Development and Legislative Strategy**

New season for PRIMs and PROs

The 2011-2012 PRIM (Preretirement Information Meeting) schedule is now available on the [public school employee website](#). CE will be adding specially requested meetings during the course of the year; customers should check the page often for updates.

In addition, the PRO (Preretirement Orientation) schedule is available on the [Civil Service Commission intranet site](#).

To ensure adequate seating and materials, advance registration is required for both PRIMs and PROs.

Registration for public school employees

Customers can register for a PRIM on the public school employee's website. To begin the registration process, customers navigate to Webinars and Seminars on the public school employee's web site. Then, they click on the region where they want to attend a meeting, fill out a short form, and submit the registration to receive a confirmation. Customers can register for a meeting as early as 60 days before the event.

Registration for state employees



PURE MICHIGAN™
Your trip begins at michigan.org

Customers must register for a PRO through their department's training or human resource office. A PRO is a six-hour, all-day session featuring information about ING payout options, social security benefits, as well as information regarding DC insurance eligibility and the DB pension plan.

Additional PRIMs will be scheduled throughout the course of the season and the schedule for videoconferences in the Upper Peninsula and northern Lower Peninsula will be added in November. The PRO schedule for 2012 will be posted on the Civil Service website beginning in early November.

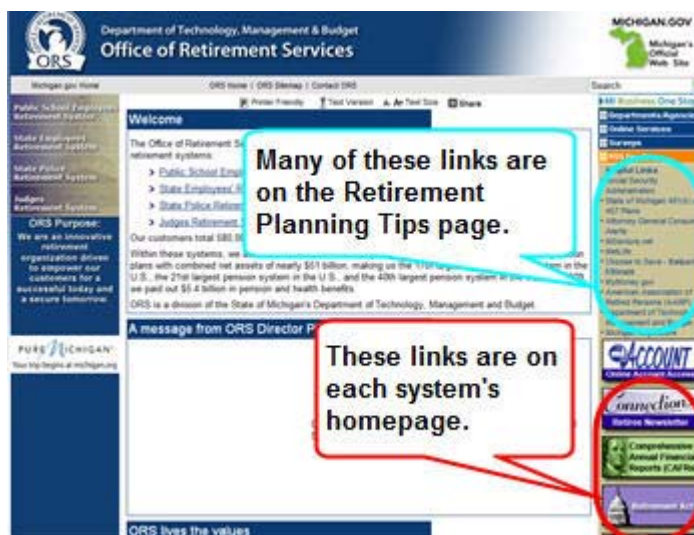
Webinars

Live online webinars are also available for our members. CE will have at least one webinar available at all times. Check out the [public school webinar schedule](#) and the [state employees webinar schedule](#). Members can register for webinars directly on our websites.

ORS homepage has a new look

On Tuesday, ORS launched a [new website homepage](#) that has a fresh, more user-friendly design. Hopefully our members will find the retirement planning tips helpful as they prepare for retirement. And the financial info, purpose, plan, values, and statistics explain who we are and how we administer the retirement plans.

If you used the links on the right navigation bar before (see image below for reference), many of these moved to the new [Retirement Planning Tips page](#). A miAccount link is now in the top navigation bar, and *Connections*, the CAFRs, and the Retirement Act links are still on the main member site homepages.



If you find anything that seems a bit funky, don't forget to use Ask Betty on the CE Now page to let us know.

CE worked with BPD and the EPC to develop the content, and **Robin StremLOW** worked with DTMB's web development team to design the new pages. Thanks to everyone who helped out!



The [fall 2011 Connections newsletter](#) will be mailed to ORS retirees with their pension payments or EFT statements next week; the newsletters are already live on the member websites. The newsletter, published twice each year, provides news and information to keep our retirees up-to-date. This issue discusses the new pension tax, has a message from Director **Phil Stoddard**, and provides information about switching to direct deposit, among other articles.

New tutorial empowers customers to get proactive

As part of PROactive week, active public school employees got a new tutorial to help them plan for and manage their retirement. There will be a similar tutorial for the state employee DB audience in the near future. [Click here to view the new tutorial.](#)

We raised \$1,669 for SECC!

Everyone really stepped up during this fall's State Employees Charitable Campaign (SECC), raising \$1,699 to support various charitable causes.

Here's a breakdown of how much money was raised from each event.

Penny Wars

- **\$607** ----- donated to the Food Bank Council

Casual Day (Staff could choose their own charity.)

- **\$286** ----- donated to the Food Bank Council
- **\$180** ----- donated to Susan G Komen
- **\$116** ----- donated to Haven House

Bingo

- **\$126** ----- donated to the Food Bank Council

Souper Soup

- **\$354** ----- donated to the Food Bank Council



SECC Grand Total

- **\$1,669**

Great work, everyone!

Detroit Free Press recognizes ORS as Go Direct partner

ORS made the news earlier this month in a [Detroit Free Press article](#) on the U.S. Treasury's Go Direct campaign. ORS is partnering with the Treasury to help the campaign reach a wider audience, and to encourage more retirees to switch their pension payment from a paper check to direct deposit.

By March of 2013, everyone receiving federal benefits must be paid electronically. These details and more are included in a Go Direct message in this month's retiree newsletter, [Connections](#).

Public Pension Standards 2011 Award

ORS was awarded the 2011 Public Pension Standards Award for meeting standards for public retirement system management and administration from the Public Pension Coordinating Council.

The award is based on a short survey with questions covering the benefit program, system audit, actuarial valuation, investments, communications, and funding adequacy.

Systems may qualify and receive recognition certificates for the Administrative or Funding Standard. ORS qualified for both certificates and was awarded the Public Pension Coordinating Council Standards Award.

We've received this award each year since 2004.



Comings



BPD welcomed financial analyst **Kelli Martin** on October 17. Kelli comes from Ann Arbor where she worked as a financial manager. Prior to that, she worked for the Ohio Office of Budget and Management — Ohio's equivalent of DTMB. She has a bachelor's degree in business finance from Western Michigan University, a master's degree in business administration from Franklin University, and she is working on a master's degree in science from Franklin University. Kelli and her husband enjoy kayaking and traveling.

Goings

AST said goodbye to **Amita Das** and **Anand Balakrishnan** on October 14.

CE and CS bid farewell to long-time employee **Robert Glennon** on October 17. Robert has taken on the role of executive director for the Dave and Mary Jo Williams Strategic Global Mission, which provides grants to inner city children's ministries.

Power of Perspectives update

You asked for more PoP, and it's coming! Power of Perspectives II: Forging Breakthroughs, will launch early next year. Based on Peter Senge's best-selling work, *The Fifth Discipline: The Art and Practice of the Learning Organization*, Forging Breakthroughs gives us practical tools for applying the "What if?" principles we learned in Power of Perspectives. It will include two parts: 1) an online, self-paced learning and simulation course; and 2) interactive group discussions.



We need facilitators to introduce the online course material at staff meetings and lead small group discussions. Any ORS/AST employee who has completed the PoP training can volunteer for a facilitator role; training will be provided. If you're interested, check out the application instructions in the [PoP KL page](#). The deadline to volunteer is October 31.

There's more!

We've added a new feature to the PoP KL page where you can share your story of how you applied PoP principals to a situation at work or home. Submit your story to ORS-PowerofPerspectives@michigan.gov. And, if you have any other ideas or suggestions for the PoP pages, send them along.

Some final reminders:

- An additional PoP training session will be offered on the mornings of October

25th and 27th. The training is open to state employees and long-term contractors. Contact [Chanda Donnan](#) to register.

- Don't forget to [nominate your coworkers](#) for a PoP Shout Out—the next award presentations will be in early November.
- And finally, copies of Steve Robbins' [What If? Short Stories to Spark Diversity Dialogue](#) are available for loan; contact [Sara Hoppes](#) if interested.

ING served sweets to start NS4RW



ING held a dessert gathering early this week to celebrate National Save for Retirement Week and our combined efforts to help members plan and save for retirement. Yum!

Shoo the Flu comes to the GOB October 28

The State of Michigan is offering flu shots at the secondary complex on October 28, 2011, from 10:30 – 3:30 p.m. The shots are covered by most state of Michigan health plans. [Click here to register.](#)

Don't forget to bring the following things with you to get your shot:

- Your state health insurance card (not BCBS Vision card or Magellan card).
- Your state employee ID.
- A completed [consent form](#).

[Click here for more information about the vaccine.](#)



Annual ORS Reunion a great success

ORS Purpose:
We are an innovative
retirement
organization driven to
empower our
customers for a
successful today and
a secure tomorrow.

The *LookOut* is
published by the
Office of Retirement
Services,
Department of Technology,
Management and Budget,
State of Michigan

Director:
Phil Stoddard
Edited by Customer
Education

Thanks for reading!!



Forty-six people showed up for this year's ORS Reunion held at Tony M's on Tuesday! Many traveled from across the state to attend the event. **Bill Motz** said, "It was a really great time, and most people stayed until the very end. If you didn't get a chance to make it, make sure to attend next year."

Note: Because some of the links in this newsletter point to network resources, some of the links may not work if you are reading this outside of the organization.