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#### ✉ Calendar

##### January

|                             |    |
|-----------------------------|----|
| Martin Luther King Jr. Day  | 21 |
| State police board meeting  | 24 |
| Public school board meeting | 31 |

##### February

|                 |    |
|-----------------|----|
| Valentine's Day | 14 |
|-----------------|----|

## A fresh new year is a great time to increase 401(k) and 457 contributions

Thinking about adding another habit or routine in 2014? It's a great time to review your State of Michigan 401(k) and 457 Plans and consider increasing your contributions.

Even small increases in contributions can yield big nest egg benefits. That's because of something wonderful and powerful called *compounding* happens. Compounding helps you build substantial savings over the long term. When you save, both your contributions and any earnings on those contributions get reinvested. Then the growth on those monies gets reinvested, and it goes on and on. Compounding interest is working behind the scenes; the more you can contribute the more it works for you.

By now you've probably received your ING quarterly statements from 2013, and it's the perfect time to review your account(s). Are you contributing as much as you can? If you're a Defined Contribution (DC) member and you're getting the employer's full match on your contributions, you can contribute more, up to the IRS limits. Also, by increasing your 401(k) or 457 Plan contributions, you can continue reducing your tax liability as you build up your nest egg.

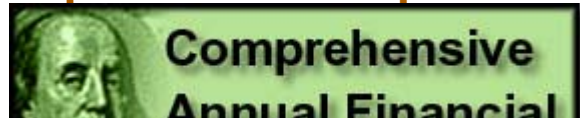
If you have any questions about participating in the State of Michigan 401(k) or 457 Plans or if you want to increase your contributions, visit the [ING website](#).

Remember, it's never too early to start planning for your future and the start of the new year is a great time to begin. But don't be the only one reaping the benefits of early investing and compounding, who else can you tell? Like an act of kindness that is passed on, tell others about the value of planning and there's no time like the present to get started.



## Annual Financial Report audit complete

The Office of Auditor General (OAG) recently completed its financial statement audit on



President's Day 17

#### On The Horizon

- State employees board meeting  
- March 20
- Public school board meeting  
- March 27

#### 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, Anthony, and Kerrie</i> ) |
| EPO  | Executive Process Owner  |
| ER   | Employer Reporting   |
| ORS  | Office of Retirement Services  |
| PRIM | Preretirement Information Meeting ( <i>public school employees</i> )               |
| PRO  | Preretirement Orientation ( <i>state employees</i> )                               |
| PS   | Process Support  |
| SME  | Subject Matter   |

ORS's four defined benefit Comprehensive Annual Financial Reports (CAFRs) and two defined contribution financial statements.

All audited CAFRs/Financial Statements received unqualified opinions from the OAG – in other words, the OAG didn't find any major problems with our reports.

All systems recorded increases in investment balances from 2012, so the system remains financially sound and positioned to meet its ongoing benefit obligations because of a prudent investment program, cost controls, and strategic planning.

You can find the CAFRs for each system on the [ORS website](#). Each CAFR has five sections: introductory, financial, investment, actuarial, and statistical. Each section contains useful information that our members, legislation, and ORS management use to help determine the financial stability of the retirement systems.

Thanks to everyone for their diligence and responsiveness during the audit process.

## Updated Pension Plus and DC websites are now live

The [Pension Plus](#) websites for public school and state police members now feature a new navigation structure and more robust plan information. For each topic listed in the left navigation bar, members will find information related to both the Pension Component and the Savings

Component. These websites also feature Frequently Asked Questions (FAQs) and links to participants' Pension Account Login (miAccount) and Investment Account Login.

In addition, the [State of Michigan 401\(k\) and 457 Plans](#) website received a facelift. It now features a more attractive and customer-friendly navigation. Plus, each retirement system's ebooks are now live under Plan Information. Participants can navigate to the ebook that contains their specific Plan Highlights by choosing their retirement system in the dropdown menu and then choosing the Plan Highlights link that applies to them.



## The first ORS Fantasy Call Center Championship is underway

The ORS Fantasy Call Center Championship competition will start on January 24 and continue through January 31.

Eight teams were drafted, with each team comprised of seven to eight members. In the style of fantasy football, there will be a daily scoring system with daily team prizes and a prize for the overall Championship Team. Daily and bonus scoring will change from day to day and will include the following:

- Highest Total Calls Taken per team.
- Lowest Average Handle Time per team.



|     |                         |
|-----|-------------------------|
|     | Expert                  |
| UAT | User Acceptance Testing |

- Highest After-Call Survey Results per team

Good luck to all the teams! Check the [ORS KL](#) CS today tab for daily scores.

**ORS Strategic Intent**


- **Forge Operational Excellence**
- **Instill Customer Confidence**
- **Engage Hearts and Minds**

## Get Fit efforts

As part of the ongoing Get Fit effort, ORS is committing to help you maintain a healthy personal workspace. Beginning in February and continuing through March, each person will be scheduled to meet with an ergonomics assessment team in Crossroads. During this visit, they will demonstrate ways you can take advantage of all the adjustments that can be made to your chair, work surface and monitor. The goal is to help you maintain healthy postures and avoid strains while you work. As always, if you have questions please talk with your supervisor.



In an effort to offer healthy snack choices, Get Fit has opened their snack bar in the Get Fit Stations (C-10 in A wing and H-1 in B wing). Among the selections are dried and fresh fruit and protein bars, and the prices are reasonable. The proceeds are used to keep the stations stocked and fund other Get Fit activities. Go see what's available today.



## Super Bowl XLVIII; who are you rooting for?

Who's your team, the Denver Broncos or the Seattle Seahawks? This year matches the power arm of Peyton Manning against the formidable defense of the Seahawks. Who will prevail? Make sure you're watching on February 2 for all the action.





## STAFF TRAINING

**Josey McCloud** attended *Understanding Your Conflict Mode Using the Thomas-Killmann Instrument (TKI)* on January 21. The training introduces five conflict modes identified by TKI and examines the cost and benefits of each mode. As a result, it teaches attendees how to implement each mode under different conflict circumstances. Josey said, "The training gave me another tool to use when working with teams and effectively guiding them towards achieving our goals."

On January 22 **Chantele Geisenhaver** attended *Five Choices to Extraordinary Productivity*.

**Ian Broughton, Steve Crippen, Jennifer Dunavant, Andy Kolp, Tim McCormick, and Angie Schrauben** attended the *CQI Breakfast – Red Bead Revolution* on January 23.

ORS sent six employees to *Basic Supervision – Preparing to Lead* training on January 24. Those that attended the training are **Lyndsay Aldrich, Dominique Davis, Ray Fleming, Carolyn Parkinson, Amy Price** from CE, and **Sandy Bloomer** from CS.

## business briefs

### ORS and AST Engagement Survey

The January 2014 ORS and AST Engagement surveys have closed. The ORS survey had 125 responses, which is 79.6 percent of ORS staff, while the AST survey had 43, 69.4 percent of AST staff. Thank you to all who completed your survey. Here is what comes next:

- February 3 – Summary to the EPC
- February 10 – Process reports to BPOs
- February 26 – Discussion during the BLA meeting (tentative).

Questions regarding your process results can be directed to your BPO.

### Redesigned employer websites

To provide better customer service to our state police, judges, and state employer human resources, the employer websites have been redesigned. Some highlights include a cleaner look and feel of the sites and revised reporting requirements for state employers.



On January 5 CS welcomed 12 staff to the team.



**Lisa Arnott** is from the Grand Blanc area but currently lives in Perry with her husband and four kids. She graduated from U of M with a degree in Business Administration. Lisa worked as a buyer for the Office of Purchasing for twelve years, and has also worked as a substitute teacher. When not at ORS she practices tai-chi, belly dancing, and enjoys walking and swimming.



**Michael Bates** lives in the Owosso area with his wife and joins CS with 12 years' experience in electronic data systems. He has a bachelor's degree in Computer Systems from Baker College. When not spending time here at ORS he enjoys listening to music, cooking, and rooting for MSU.



**Erica Higbee** graduated from Grand Valley University with a degree in Allied Health Science and Bio Medical Science. When not spending time with ORS she can be found spending time with family and friends. She is from the Portland area and also enjoys watching the Detroit Lions.



**Valerie Holley** lives in the Dimondale area and has an associate's degree in Human Resource Management. She's worked at Lake Trust and also managed a local store in Potterville. She has two boys who live out of state, one dog (Phillip Matthew Holley), and enjoys spending time with her family and neighbors.



Welcome back to **Marie Leik**, who left ORS in 2012 to spend time with her new family. She is from the Philippines and gained her citizenship this past July. She lives with her daughter and her husband and is expecting her mother to come live with her in the next several months. Marie enjoys cooking and baking, and eating of course!



**Andrea McDonnell** lives in Dewitt with her two sons, daughter, and husband of 16 years. Andrea spends much of her free time attending soccer games and dance rehearsals. She has a degree in teaching from Western and also enjoys reading.



**David Meiers** joins the team with knowledge and experience across multiple ORS processes. David lives in Owosso, enjoys singing in his church choir, reading, creative writing, and board games. He has a bachelor's degree in Computer Information Systems and a minor in Liberal Arts.



**Marissa Palacio**, a Lansing native, still lives in the area with her 3 year old daughter. She has attended LCC and has previous experience in Customer Service working at the American Cancer Society. Outside of ORS Marissa enjoys spending time with her daughter and family and playing basketball.



**William Roe** is also from the Lansing area. William graduated from CMU with a BS in Psychology minoring in Interpersonal Relations. He spent some time with AT&T in customer service and enjoys traveling, reading, and dabbling with the latest gadgets.



**Jeffery Rudnik** is from Cleveland and moved to the Lansing Area in 1981. He served in the Air Force, graduated from MSU with a Journalism degree and spent 27 years with the Lansing State Journal. In Jeff's free time he enjoys teaching sports to his 10 year old grandson and being a season ticket holder with the Cleveland Browns. Jeff's family is expecting a third grandson at the end of February.



**Donna Seeger** graduated from MSU's College of Engineering and Computer Science. Before ORS, she worked at Chevron Information Technology in California. She lives in De Witt with her two teenagers, and enjoys watching her daughter's volleyball games and working to rescue dogs.



**Stefanie Turner** lives in the Williamston area with her husband and six-month-old son. She graduated from MSU with degrees in advertising and cosmetology. She has previous experience working at BS&A Software, and enjoys styling hair and spending time with her family and two cats.

AST welcomed 3 new employees.



**Bharath Eegapuri** started with AST on January 2. He is from Hyderabad, India where he earned his bachelor' in Computer Science at Jawaharlal Nehru Technological University. He lives in Okemos with his wife and will be married one year in February. Outside of ORS he enjoys playing cricket and watching movies.



AST welcomed java developer **Sai Korpu** to the team on January 14. He is also from Hyderabad, India where he received his bachelor's in Civil Engineering. He currently lives around the Lansing area and enjoys reading, auto games, and watching movies.



**Chithirakala Selvaraj** began as a java developer with AST on December 30. She is married and lives in Okemos with her husband her one son. She graduated from Bharathidasan University in India with a masters in Computer Application. She enjoys reading, cooking, and spending time with family.

### On the Move

**Katie Little** has accepted a Health Care Data analyst position in BPD. Her new position began on January 13. Congratulations Katie!

### GOING

AST bid farewell to **Suryanarayana Krishnareddy** on January 14.

## Kudos



Kudos and thank you to **Linda Johnston** for helping in getting the CS kudos published in the *LookOut*.

Kudos and thanks to **Stormee Gallagher** for going the extra mile and getting PRIM sign-in sheets to me on her day off.



Today, **Danielle Goodale** took two hours out of her busy schedule to allow me to observe the steps required for processing SERS retirement applications.



Danielle was very professional and demonstrated her knowledge well. She made sure I understood what she was doing as well as the why behind it and made me feel comfortable as an observer. Her willingness to accommodate my needs for information was appreciated.



#### Kudos to **David Meiers**

Today has been a busy day at CS \_ ORS, but in the mist of all the hustle and bustle, there is still a customer service warrior. Hats off to David. for providing great service to a customer. She said that David was courteous, efficient, patient, and calm. She commented that he is the example of a great ORS customer service representative.

#### Kudos to **David Meiers** and **Lynn Stowell**

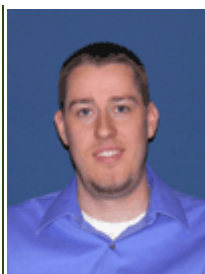
A member called to say that "Lynn S. took the first part of things and David took the ball to the goal line." The customer thanks Lynn for getting things started via her message board response. The customer said that the call with David was terrific, that David handled the call with care, and his concern was appreciated. He liked David's style of customer service.



Kudos to **Linda Johnston** and **Johnny Moore** for assisting a member in the building and responding quickly to get medical assistance.







Thank you **Doug Murray** for doing individual testing on a refund application. By doing this testing it told us if a refund application is already in Clarety a member cannot apply for a refund in miAccount.



Kudos to **Ryan Marr** for assisting Sherea in logging into Siebel. With his determination he was able to discover her log in name was set up incorrectly. She has been requesting assistance for some time and has had assistance from others trying to resolve her issue.



Thank you to **Marla Milton** for going the extra mile this weekend with the Websphere deployment and validation. I know the timing was off and you spent more time in the office and validating then you expected. This was an important deployment and your time and effort ensured that the implementation was successful and that we could rest easy knowing that Monday morning (today!) all would be fine. I appreciate your dedication and effort!

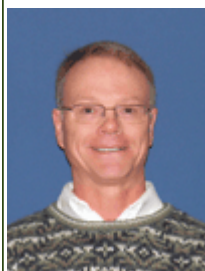


Thank you to **Process Support**.

I have hired 7 people in my short, year and half of service here at ORS. Each time we on-boarded a new employee we faced challenges with having the computers ready, phones set up and access granted for folders and software.

We had a new employee start on Monday. His access was set up (login, folder access, Clarety access) a WEEK prior to him starting. His phone works properly. His office was cleaned and ready for him to step into when he arrived. He had a computer ready to go with all of the proper software on it.

This really makes a world of difference in starting a new employee out on the right foot (and makes my life easier!).



Thanks **Fred Doll!**

Fred was invited to a meeting and to review documents, but he was the wrong Fred (should have been Covert). Even so, Fred took time out of his busy schedule to provide a thorough and thoughtful review of the documents, and gave me some great feedback on how to make them better.

Just one of the things I love so very much about CE... everyone is willing to pitch in and help make our stuff the best it can possibly be.

A member wrote: I am very impressed by your web services for my type retirement, it is very well updated and easy to use.



I will be visiting much more often to clear up problems I have been experiencing with understanding how it works. Thank you for being here for us all.



Kudos to **Sara Hoppes** for working quickly with Ian and I to navigate the out-of-state travel process. She made the process 1,000 times faster and we really appreciate it.



I would like to express my appreciation for the assistance that I was given by **Marla Milton** when I brought a miAccount escalation issue to her attention. Marla took control of the issue, called the member and gave him complete and accurate information on getting his issue resolved. The member was very thankful and appreciated the personal touch that he received. Thank you Marla for helping our members feel confident about what we do here in ORS.

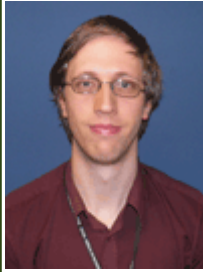
Thank you Get Fit team!

The team, **Lucas Cairns, Candace Clay, Dominique Davis, Jeanne Fox, Sherea Lacy, Chana Lee, Andrew O'Keefe, and Heather Zaban** got a good job and thanks for providing the snack station from Angie Schrauben. She said she really appreciates what we are doing on the team.



Kudos to **Don Williams!**

Thank you Don for all of your assistance with this transition. Your patience and diligence in getting staff issues taken care of in a timely and professional manner is greatly appreciated.



A member wanted ORS to know what a great employee we have in **Joe Grinston** He was very patient and knowledgeable and he's a good member of our team!

Thanks **Lucy Clay** for providing stellar Customer Service!  
Jeanne Fox would like to give kudos to Lucy for taking ownership and volunteering to call a member back on her behalf once she gets the member Rx information to get his/her prescriptions. Jeanne's expressed that Lucy is awesome because she was going over and beyond to assist her with this member because she was going to be out of the office which would delay the member's coverage. Jeanne stated that Lucy was sincere about getting this member taken care of.

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

The *LookOut* is

Kudos to **Mary Staley**

**MSBO  
Mission Statement**

The Michigan School Business Officials (MSBO) works to continually improve the leadership of, and management in, school business and operational services while enhancing the professional, social and economic well being of its members.

**Core Values**

Professionalism requires school business officials to place the welfare of education before personal gain. Trust in the integrity of our profession is essential to the prosperity of education. The core values of our association are:

1. The Value of Education
2. Dedication to Leadership and Learning
3. The Power of Synergy
4. Commitment to Ethics

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Friday October 18, 2013

Office of Retirement Services  
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Lansing, MI 48909

RE: August 22, 2013 NMSBO Presentation

Dear Mary,

Our group would like to thank you for your informative presentation on August 22<sup>nd</sup>. We appreciated you presenting on the changes with regards to reporting for retirees, as well as all the changes affecting the payroll processors for this school year. It's been a crazy year for reporting and it was great to get information directly from the source.

Thank you for taking time out of your busy schedule to present to our group. We truly appreciated it.

Sincerely,

*Northern Michigan School Business Officials members*

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State of Michigan

Director:  
Phil Stoddard  
Edited by Customer  
Education

Thanks for reading!!



Kudos to **Pam Ward**



#### For Pam Ward

This email is to tell you about the great service that Pam Ward has provided to us, to state employees at the Secondary Complex, and to the Office of Retirement Services' (ORS) customers.

As you know this year it was DTMB's turn to run the Flu Vaccine Clinic for the General Office Building (GOB). Pam did a remarkable job of organizing and orchestrating the entire clinic including communicating with the Employee Benefits and Wellness Division of Civil Service regarding software issues with the employee self-registration program. Pam was very astute and recognized that there were problems with the program and contacted Civil Service. This allowed Civil Service to take action and quickly resolve the problem. This is just one of the many tasks that Pam took to make this year's Flu Vaccine Clinic at the GOB a success.

It is always a delight to work with Pam because of her cheerful and friendly attitude, but it is also a great experience to work with Pam because she recognizes a problem and takes action to resolve the problem and without being asked to do so. I salute her initiative and her ability to take decisive action to resolve issues.

Another example of her "Can Do" attitude occurred today, when I spoke with Pam asking about whom I should contact to resolve an issue centered around the phone number our student has. The student has been receiving calls from people who expected to obtain assistance from Disability Determination Services (DDS) regarding their Non-duty Disability Retirement Applications. Instead of providing me with a name and phone number of ORS person to contact, Pam told me that she would find out what the cause of the problem was. Pam accomplished solving this problem before the day ended. The ORS team that refers people to DDS now has the correct DDS local phone number as does our student so that we both can assist with providing the ORS customer with a positive experience.

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**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.