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#### Calendar

### August

Golf outing 14

#### On The Horizon

- Public School board meeting - September 19
- State employees

## Food, fun, and sun at the ORS picnic

Wednesday, August 6, was the ORS picnic, held once again at Fitzgerald Park in Grand Ledge. Staff enjoyed wraps and chips and then desserts provided by volunteers.

**Wayne Aldrich** provided the tunes and **Randy Bitner** manned a photo booth, where staff dressed up and hammed it up for the camera. Thanks also to Wayne and Randy for providing their own equipment for the music and photo booth and for volunteering their time for set up and take down.

There were a number of new and fun activities, including minute-to-win-it games to earn raffle entries. The Get Fit team hosted a watermelon-eating contest and hula hoop contest, which young family members excelled at. The weather was perfect and fun was had by all.

Thanks to the EMPAC Team (**Dustin Duprest, Kristin Forester, Jamie Guardiola, Rudy Litterini, Diane Monroe, Carolyn Parkinson, and Ava Smith**) for all the work that went into making this year's picnic such a success.



Click [here](#) to see the entire gallery.

board meeting  
- September 25

#### Quick Links

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

#### Commonly Used Acronyms

|      |   |
|------|---|
| AST  | Application Support Team  |
| BLA  | Business Leadership Assembly (EPC, BPOs, and BPLs)                        |
| 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 (Phil, Laurie H, Laurie M, Anthony, and Kerrie) |
| EPO  | Executive Process Owner   |
| 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   |

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## DTMB All Managers meeting

On July 29, all ORS managers and supervisors attended the DTMB All Managers Meeting. This annual event brought everyone together to focus on strengthening our staff and serving customers as one DTMB team. The agenda included:



- Rollout of the [DTMB Strategic Plan](#);
- Recommendations from the Employee Engagement Action Planning Team; and
- An opportunity to network with peers.

As a result of the DTMB engagement survey, the Employee Engagement Action Planning Team (EEAPT), including ORS representative **Chanda Donnan**, has been working together to help shape the future of the department. The EEAPT was asked to identify the department's areas of strength and recommend organization-wide actions to improve both communication and leadership within the department. Look for an email soon containing the complete action plan.

**Phil Stoddard** led a small discussion group, and ORS team members **Wayne Aldrich, Andy Kolp, Josey McCloud** and **Jennifer O'Herron** also provided their expertise by facilitating small group discussions to generate ideas to strengthen the strategic plan.

ORS Attendees: **Kevin Kubacki, Meg Leonard, Letitia Levi, Laurie Hill, Martha Mackie, Laurie Mitchell, Ryan Nevins, Andrew O'Keefe, Christina Sanchez, Bianca Torres, Allison Wardlaw, and Danielle Watkins.**



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## An honorary recognition

DTMB Director David Behen is recognizing staff for innovative efforts that go above and beyond normal expectations and







promote the State of Michigan's Good Government values of leadership, excellence, and teamwork.

During a quarterly meeting for Customer Service (CS) on July 30, 2014 the staff was informed that our very own Business Process Leader Letitia Levi received one of these prestigious awards.

Letitia received the Good Government Symbol of Leadership coin. This special honor was presented to her by Lieutenant Governor Brian Calley, during the DTMB All Managers meeting.

According to **Laurie Mitchell**, Letitia was nominated for "the way she has methodically introduced new program after new program to raise the expertise of line staff, the skills of her analysts, and the effectiveness of her supervisors. Today, she has a high-performing, highly-engaged team that serves the customer energetically, expertly, and reliably."

ORS has faced additional volumes of work over the past few years with multiple reforms and insurance changes. Letitia's teams absorbed these changes without increasing staff and while seeing an improvement in staff's engagement scores!

As employees, think about all of the changes you have seen in CS. Here are a few:

- The Quality Assurance program – including written correspondence
- New scorecards
- Tracking average handle time on telephone calls
- A new Ambassador Team
- Onboarding plans for new staff and supervisors
- New pages on the Knowledge Library to provide information to CS staff quickly and accurately
- Cross-trainings within CS as well as across other departments
- Growth opportunities

Congratulations, Letitia! Changes of this magnitude don't happen overnight. Your dedication to CS and ORS is greatly appreciated.



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## Happy first birthday to the ORS Facebook page

It was one year ago on August 12 that we hit the “publish” button on the ORS Facebook page. At the time, we deemed 5,000 likes within the first year as a success, based on our benchmarking of other pension systems. Within the first month we sailed past 14,000, and we knew all bets were off. Since then, we’ve slowly grown to over 21,000.



So what does this all mean?

The main purpose behind ORS launching on social media was to educate our customers, which in turn would reduce pressure on our processes. We do this through a daily content strategy. For example, Thursday’s strategy is to increase online self-service, and planned posts on Thursday encourage members to perform actions in miAccount. CE staff monitors Facebook stats to see what content receives the most engagement from our fans, and use this feedback to create new content. (Engagement is defined as the number of likes, comments, shares, or clicks on a post.)

Click on this [chart](#) to see how our page likes and daily engaged users have been steadily increasing since launch, apart from a blip in December when Facebook was tweaking its algorithm.

From a qualitative view, we answer member’s requests for information by directing them to web content. We also direct them to the miAccount Message Board frequently when they have questions specific to their account. By responding in a genuine voice, we remind them we are human beings who care about our work, and our work is to serve our members.

While ORS’s social media efforts are primarily informational or educational, occasionally member posts and messages require follow-up by customer service. These requests are forwarded to the CS supervisors, who then forward it to the appropriate staff member. CE also calls on BPD staff occasionally when a member posts a complex question on funding, legislation, or insurance plan design. While social media is housed in CE, it definitely depends on every process for its success. Thank you to everyone who has contributed to this team effort!

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## ING hosts ORS contingent

Ensuring quality service for our customers and maintaining strong relationships with partners requires ongoing due diligence to make sure our goals and mission align with those of our largest partners. ORS recently signed a new five year contract with ING to continue recordkeeping our Defined Contribution and Deferred Compensation plans for our participants.

With this renewed commitment to ING, ORS sent a small group to ING’s facilities in Braintree, Massachusetts and Windsor, Connecticut last Tuesday and Wednesday, July 29-30, to learn more about how ING’s operating philosophy fits with ours, how they ensure quality service for our customers, and to meet the people who work there.

**Phil Stoddard, Anthony Estell, and Kerrie Vanden Bosch** had a whirlwind tour of ING, hearing from Operations and IT, Legal and Business Continuity/Risk Management, plus the Communications, Advice, and Internal Control divisions. The team learned about where the corporation stands, and had the opportunity to

converse with ING partners they'd never met before—finally putting a face to a familiar name or voice on the phone.

Kerrie commented, “I was impressed with the employees; how passionate they were about what they do, and how excited they were to talk about it—especially operations! They really want to do the best job possible for our participants.”

Security is taken seriously at ING. Kerrie noticed how many IT security positions there were on the organizational chart, and was amazed to hear that those positions were just the high-level ones—that ING has about 240 people on its IT security team!

ING also shared about the contingency plans it has in place to deal with unforeseen events, like the bombings at the 2013 Boston Marathon, which happened not too far from ING's Braintree, Massachusetts facility. Our planet's future is also important to ING, as demonstrated by its carbon-neutral, fully green corporate offices in Windsor, Connecticut.

Many of us at ORS have enjoyed our working relationship with the ING liaison staff here in our office, and now we know how well they represent ING as a whole.

Anthony, Kerrie, and Phil posed under the State of Michigan signage at ING headquarters in Windsor. ORS is ING's biggest government client, and one of ING's largest clients overall.



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## Public School Deferred Compensation option rolling out August 11

Starting August 11, public school employers can sign up to offer a Deferred Compensation option through the State of Michigan 401(k) and 457 Plans. Basic and MIP members with Premium Subsidy are eligible to participate. The Deferred Compensation option extends the opportunity to invest in the 457 Plan, and it also allows rollovers to the 401(k) Plan. These plans are already available to public school members in the Pension Plus plan, the Defined Contribution (DC) plan, and members with the Personal Healthcare Fund. However, this new option does not allow employer mandatory or matching contributions.

If an employer chooses to offer the Deferred Compensation option to its employees, the superintendent, college president, or a designee must sign up online at [www.michigan.gov/psru](http://www.michigan.gov/psru). After the required information is submitted, accounts will be set up at ING for all eligible employees at that reporting unit, and ING will mail those employees a welcome letter and an account password. ING will also send promotional materials on the Deferred Compensation Option to participating employers that can be distributed to employees.

Employees who choose to participate will use the password to log in to their accounts at [stateofmi.ingplans.com](http://stateofmi.ingplans.com) where they can designate their contribution rate and manage their investments.

The employer website provides resources employers can use to learn more about offering the option, including Q and A, plan information, fund and fee information,

investment commentary, and reporting instructions.

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## Priority Health first HMO to receive insurance changes electronically

Beginning August 4, 2014, Priority Health became the first HMO to receive health insurance enrollments, terminations, and demographic changes, electronically via the 834 report. Currently, ORS sends the 834 report to Blue Cross Blue Shield of Michigan (BCBSM), Catamaran, MedImpact, Delta Dental, and now Priority Health. This enhancement will help reduce processing time and decrease errors in enrollments for some HMO enrollments. As part of the roll-out, Priority Health also created an opt-out form for Medicare members, which is part of Medicare CMS regulations.



The other HMOs will be added to the 834 report in the near future after the IPR demographics and file transfer project is deployed in Clarety. Once all HMOs are added, we will no longer need a separate HMO enrollment form to be submitted with the insurance enrollment and change request form. Kudos to several staff who worked on the project, including **Steve Cary, Kara Gross, Mark Howard, Katie Little, and Travis Peake.**

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## Get Fit Health Fair

The first Get Fit Health Fair was a rousing success! Over 100 staff participated in various activities. Every attendee received a raffle ticket for the grand prize, a gift certificate donated by Douglas J. Free reusable bags were donated by McLaren and pamphlets on subjects such as smoking cessation and food nutrition guides were donated by HAP. Lots of freebies too!



One of the hits was the mystery box raffle. You purchased tickets for a chance to win a prize but you didn't know what was in the box! Some of the prizes were cooking magazines, filtered water bottles, and a food steamer. "This was an awesome event!" and "I'm so glad you did this. I didn't know what my blood type was!" were some of the comments heard. Special thanks to our presenters, McLaren Health Systems Lansing for doing the blood type testing, DRM Genesis Home Healthcare Providers for taking blood pressures, and **Lucas Cairns** for exercise advice.

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On July 30 and 31, **Jennifer Smith, Bianca Torres, and Allison Wardlaw** attended Crucial Conversation training. This program will help the participants learn



to master their crucial conversations to improve their organization, strengthen their relationships, and improve their overall health.

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## business briefs

### CS survey results launches pilot program

You said it, we listened! One of CS's top suggestions in business reduction strategies was to send the "whens" and "whys" of Medicare enrollment information to our members that are approaching age 65. A pilot program to target the actively working SERS members is underway now!

### New links brighten up the web pages

Today we launched 7 new, full-color billboard style links on each system homepage. The billboards cycle through various "hot topics" and "quick links," allowing more ways for our members to quickly access retirement information and tools.

### State Employees' Disability brochure updated

The *SERS If You Become Disabled* brochure has been updated. New copies are now available. The updated version can be found [here](#). This edition includes an expanded section on returning to work.

### ER outreach

As part of Employer Reporting's ongoing audit services and outreach program, **Mary Staley** and **Ava Smith** visited Charlotte Public Schools on July 22. Mary and Ava provided training and reporting assistance to Charlotte's new reporting staff in a one day hands-on training. "Charlotte recently hired new payroll employees with little to no retirement reporting background. This was a great opportunity for us to reach out to them to provide education and training while strengthening our employer relationship," explained Mary.

### Summer application processing update

For the month of July we were able to place over 97.6% of the public school applicants on payroll. We received 3,154 completed applications from eligible members, and of those 3,080 were paid in July.

To recap how the communication efforts have reduced business, here's how April through July compared to last year as a baseline: We've reduced calls from applicants by 31% (with over 3,000 calls deflected); We've increased use of message board by 60% (just over 1,000 customers used this instead of calling); Overall, we've reduced contacts from our applicants by 17%!

Work continues on August applications, with the AP team ramping down as we return to our normal processing approach. Communication to customers remains ongoing with plans underway to expand and continue this approach.

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**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



### Goings

PS said goodbye to **Jennifer Thomet** (Carter) on August 1. She is moving closer to her husband's new job in Traverse City. Best wishes, Jennifer!

ER is wishing **Wayne Aldrich** a farewell; Wayne accepted a position with the Michigan State Police. His last day will be August 14. Hats off, Wayne!

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Services,  
Department of Technology,  
Management and Budget,  
State of Michigan

Director:  
Phil Stoddard  
Edited by Customer  
Education

Thanks for reading!!



## Call out for your photos

The *LookOut* team wants your photos to showcase as a future header. If you have a photo to share, email it to [ORS-LookOut@michigan.gov](mailto:ORS-LookOut@michigan.gov).



This picture was submitted by Thasin Sardar in March 2014.

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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.