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Business meeting recap: Charting our course for 2011

Two incentives and reforms made last year one of ORS’s busiest. To reflect on our successes and look toward the future, ORS held a special business meeting for staff.



Anthony Estell kicked off the meeting by introducing a trailer for the success video. After some explosions and hard-hitting incentive action, **Sean Bodell** lead all of ORS in a bingo game mixer. Staff were so excited getting to know their coworkers that Sean had a tough time getting everyone back to their seats!

Anthony then introduced the world premiere of *ORS: Successes 2010*. The EPC thanked everyone at ORS for their hard work during the past year, and the crowd gave themselves a round of applause and a literal pat on the back for a job well done.

After that, it was time to look toward the future. **Phil Stoddard** began by saying, “Today, we put a flag in the ground and look forward to a new year.” He also explained that what ORS does each day directly impacts 1 out of every 9 households in Michigan — we took a trip to Anthony’s neighborhood to prove it!

Tim McCormick took the mike and gave staff an idea of what’s ahead for 2011. “I think we need to grab hold of things we’re not satisfied with and make sure we don’t become content,” he encouraged. “Everything we do needs to be tested against our vision: are we helping our customers be successful today and prepared for tomorrow?” He also explained that the strategic plan, our blueprint to reach those goals, was created by the hearts and minds of almost everyone at ORS.

He yielded the stage to **Laurie Hill** who described how ORS will navigate through 2011. She pointed out that stormy seas may be the new normal. Going into 2011, she noted, “we’re going to need all hands on deck.”

Anthony wrapped up the meeting by getting the crowd to think about their unique perspectives. He explained that in WW2, a group with diverse perspectives was able to break the Enigma Code — something that wasn’t possible any other way. “By sharing our perspectives”, he said, “we’re able to see others’ views, [and] we’re better equipped to solve problems.”

Calendar

March

All Staff Meeting suggestions due	1
State Employees Board Meeting	4
Fat Tuesday/Mardi Gras bake sale	8
Public School Board Meeting	11
Daylight Saving's Time begins	13

On the Horizon

- St. Patrick's Day - March 17
- Spring begins! - March 20

- All Staff Meeting
- April 12

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, Tim, and Anthony</i>)
EPO	Executive Process Owner
ER	Employer Reporting
FLB	Forms, Letters, and Barcode
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 Expert
T&T	Tools and Technology
UAT	User Acceptance Testing

Anthony then said that there’s a vision for the type of organization we need to be. It’s a place where, “open mindedness is practiced, respect is demonstrated, diversity is valued, and creativity and innovation thrive.”

The talent, experience, and passion at ORS, along with the strategic plan, will set the direction for 2011 and beyond; the success we shared in 2010 is proof. As Tim said, “Within the room, we have all that we need to move our ship forward.”



ORS staff packed Conference Room A on Thursday to celebrate last year’s successes and get excited for 2011! [To view a gallery of the business meeting, click here.](#)

If you'd like to see the ORS success video or share it with your families, hold tight! CE is developing a way to share the video and will let you know as soon as it's ready.

DPS Open House packed, successful

Almost 800 Detroit Public Schools (DPS) workers lost their jobs when their positions were privatized earlier this week, but many were still smiling at ORS’s DPS Open House last Tuesday.

About 250 members showed up at the packed Cadillac Place conference room to understand their options with ORS, fill out forms, and get account-specific information. There were already about 20 people waiting to sign in when the doors opened at 10 a.m. And, although the doors closed at 7 p.m., CE staff members **Joy Bartell, Fred Doll, Pam Garver, and Robin Stremlow** stayed until every customer was served around 10 p.m.

Prior to the Open House, each affected member received a letter that explained which category they fell into: eligible to retire, eligible to retire with a service credit purchase, vested but not eligible to retire, and not vested. Because members knew this, they were able to ask the right questions and get the right forms. Almost every person who didn’t retire or take a refund named a beneficiary.

Robin Stremlow said, “I loved helping out in Detroit. It felt great to help explain everyone’s options and make sure they were making informed decisions during a stressful time.”



- 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

Joy Bartell attended three union meetings the week before and helped almost 170 people better understand how their termination would affect their retirement plan.

A senior partner with Capitol Services, Inc., said this about Joy: “Joy Bartell did a great job yesterday with a very anxious and upset group of operating engineers. She handles everything so graciously! Thanks for all the extra support for these terminated DPS employees.”

From ORS, thanks to everyone who helped DPS employees during this transition.

Active survey shows improvement

Results from the annual active survey have been compiled and are available for review. Overall, this year’s survey results are similar to 2009 with improvement in a few areas.



Highlights include:

- 14 percent fewer state employees said they had no contact with ORS.
- 11 percent more state employees indicated ORS’s service is good.
- State employees, state police, and judges reported better understanding of their pension benefits.
- State employees and state police reported improved retirement planning.
- Nearly 17 percent of respondents completed the survey online.

In addition to the online surveys, we received nearly 800 paper surveys in just over two weeks. Thanks to PS who handled the returned surveys. [To see the 2010 active survey results, click here.](#)

You may notice a slightly different look to this year’s report, because Statistical Package for the Social Sciences (SPSS) software was used for most of the data analysis. The software drastically shortened the amount of time needed to run the queries and perform calculations.



CE’s **Annie Earls** and **Kyle Schafer** did most of the background work preparing the survey data. Annie also did a great deal of research learning how to use SPSS and teaching CE staff what she discovered. **Fred Doll**, CE’s survey lead, analyzed the data, prepared the report, and presented the findings to the BLA.

The BLA is currently evaluating the results and will decide on action items for each process.



Microsoft Office 2010 training Monday – spots available

You can still sign up for Microsoft Office 2010 training on Monday, February 28, from 7:30 – 9:30 a.m. Training will be held in conference room T. To register, talk to your supervisor and sign up on the [MS Office training sheet](#), or call **David Travis** (2-6848) or **Kim Marton** (2-6071).

Public school statements and PROactive to be delivered Monday

[2010 Member Statements](#) and [PROactive](#) newsletters are scheduled to be mailed to approximately 235,000 active public school employees on February 28.

Photo board shows smiling faces

The Crossroads photo board has been updated with time- and

act.

money-saving prints of ORS staff. To the best of our knowledge, each staff photo has been reprinted and should be on the board. If you notice that anyone needs to be added or removed from the board, please notify **Erica Quealy** at 2-5703 or quealye@michigan.gov.

Understanding employer contribution rates

On February 17, ORS mailed contribution rate letters to all public school employers. This year, these letters were different — for the first time ever, ORS provided two years of contribution rates (FY 2011-12 and FY 2012-13). This will help schools plan their budgets much more efficiently. [Click here to see the contribution rates.](#)

FY2011-12 and FY2012-13 contribution rates were mailed to public school employers February 17.

To better serve our customers, it's important to understand why contribution rates fluctuate from year to year. Before you can understand that, you must understand how public retirement plans are funded.

Public retirement plans are prefunded by three sources: employer contributions, member contributions, and investment earnings.

Throughout the past 15 years, investment earnings have made up the vast majority of the money paid out, as noted in the graphic below. If investment returns match the amount projected, and other factors don't cause contributions to rise, rates can remain relatively stable. However, when investment returns are low, as they were in 2008 and 2009, contributions rates must increase to make up the gap.



Employer contribution rates also rise when unforeseen events occur. For example, retirement incentives are not projected in the actuarial calculation of the employer contribution rate. When an incentive takes place, members retire sooner than predicted and they start drawing pension benefits early. This condition creates an earlier outflow of cash than anticipated, and it requires that additional contributions make up the difference.

The other item that changes contribution rates is the number of members in the system. If members leave the system through privatization or reduced student enrollment, the necessary contribution amount must be spread over a smaller number of members, and therefore rates increase.

For more information about how public retirement plans are funded, check out [Pension Contribution Requirements](#) by NRTA, AARP's Educator Community, and [Facts on State and Local Government Pensions](#).

Got a Widget idea? Send it to the [LookOut](#).

Office 2010 is almost here



You may have noticed the flurry of activity around the office as staff prepare for the Microsoft Office 2010 migration that is tentatively planned for March. Staff from multiple processes are working hard to make sure the transition goes smoothly.

- Staff in CS, CE, PS, and ER are testing forms to make sure they will work well in Clarity.
- CE is asking for forms, cut-and-paste language, and letters used by staff outside of FLB templates so that they can review them and make sure they will look right and work correctly after the upgrade.
- PS is working with DTMB to schedule more Office 2010 training in March and throughout the year.
- The Office 2010 migration team is making sure that staff will be available to answer technical and how-to questions the day of the migration.

Here is what you need to know when the migration happens:

- Keep your computer on during the migration.
- You can do everything you did in Office 2002 and 2003 in Office 2010, along with many new things.
- Some buttons and toolbars may look different in the new version of Office.
- The Office 2010 migration team will send you emails with more information as the migration date arrives.

In the meantime, here are some useful links with information about Office 2010:

- [Microsoft Office tutorials and aids.](#)
- [Word 2010 Quick Reference Guide.](#)
- [Word 2003 to 2010 Interactive Cheat Sheet.](#)
- [Office 2010: The Movie](#) (spoiler alert: Clippy is dead!).

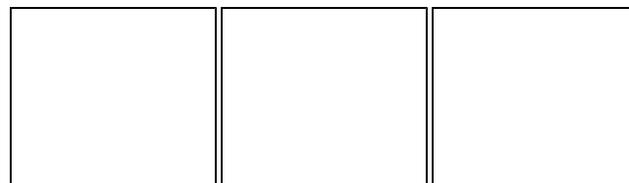
Comings & Goings

In January, AST welcomed project manager **Venkata Angajala**. Venkata has his masters degree in enterprise business management and most recently worked for Marriott International. He enjoys reading about business, financial, and IT trends. He also enjoys playing cricket and watching movies.

On February 22, CS welcomed **Vernique Jackson** and **Marla Milton**.

Vernique, who commutes from Saginaw, previously worked for the Unemployment Insurance Agency. She is a Saginaw Valley State University graduate with a major in professional and technical writing and a minor in communications. She has two girls, a one-year-old and three-year-old.

Marla last worked in the collections division for Treasury at the Ops Center. She received her associate's degree in business and is currently working on her bachelor's degree in management at Northwood University. She has been married to her husband, who is a local pastor, for nearly 13 years and they have two children – a ten-year old daughter and eight-year-old son.





Effective February 18, temporary employees **Angie Donovan** and **Diane Baxter** left ORS for positions with the Department of Treasury.

CE's **Tony Mills** will be leaving ORS in early March. He accepted a Branch Manager Trainee position with the Secretary of State. Good luck, Tony.

Julie Mysak's last day at ORS is March 4. She accepted a position with the Office of Financial and Insurance Regulation.

Customer Service wishes the best to **Joseph Yang** as he embarks on new opportunities with the Department of Community Health. His last day is March 4.

Name Change

Linda Hartwick, formerly Linda Turner, married in September. Please note her new last name.

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

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 Phil Stoddard
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Sounding Out is a way for ORS staff to share ideas, viewpoints, gripes, praises, and concerns. Email your opinion (300 words or less, if possible!) to ORS-LookOut@michigan.gov.

Tony Mills tells us about giving blood and the impact donated blood has on others.



Tony Mills

Give of yourself. Literally.

On January 20, the American Red Cross set up in Conference Room A to accommodate donors giving blood. I was pleased to see many of my coworkers donating, but I was disappointed to learn that the number of donors from the GOB has been declining for several years.

It's time for all of us to step up our efforts because:

- Every two seconds, someone in the US needs blood.
- 4.5 million Americans will need a blood transfusion each year.
- Only five percent of the eligible US population donates blood in any given year.
- Healthy donors are the only source of blood and there is no substitute.
- One pint of blood can save up to three lives.

If only one more percent of all Americans would give blood, blood shortages would disappear for the near future.



It's safe to say that each of us has a family member or friend that has needed blood during a surgery or treatment for a medical condition.

As the father of a child who underwent two surgeries to remove brain tumors, I was thankful each time that donated blood was available. Blood does not come from a factory or appear by magic. It comes from people who donate an hour of their time and a pint of their blood to save lives. By donating regularly, you could help save nearly twenty lives each year. If you are an eligible donor, there is no excuse not to do so. The Red Cross will be back in mid-March. I hope you'll be there!

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.