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**Fall 2008 all staff meeting**

The fall All Staff meeting was held on October 7.

**Question & Answer Session**

A question and answer session started out the meeting as Director **Phil Stoddard** answered three pre-submitted questions. [View the questions and answers submitted prior to the meeting.](#) To view questions submitted the day of the all staff meeting, be sure to look in the next edition of the *LookOut*.

Explaining his plan for the future, Phil also stressed the following, "Our members and stakeholders need to better understand and appreciate our products. We must promote what we do by emphasizing the value that our products have to employers, workers, and retirees."

"Our services to our customers are significantly better than they were. We've finished the Vision ORS project, but is the customer reaping the full benefit of it? The answer is not yet – we must deliver the services our customers need."

Why must we promote our employer sponsored retirement plans and retiree healthcare? Because if you are reading the news and following the legislature we know the products we offer are constantly being discussed. People seem interested because of the perceived high cost and concern over how much to spend on worker benefits."

**401(k) and 457 plans – Are you preparing for your retirement future?**

**Elaine Lewter** talked about the transition from CitiStreet to ING as well as plan enhancements like the target asset allocation funds. **Heidi Schiller** of ING presented an overview of the 401(k) and 457 plans. She advised people to be smart during these economic times: "If you have a plan, stay with it. If you don't have a plan, you may want to start one."

**ORS Goals on the Move**

**Lisa Barrone, Phyllis Bradley, Jennifer Dunavant, Andy Kolp, Cindy Mooney,**



Each EPC member had fun drawing pictures of each other in an exciting round of Pictionary. View more event photos!

**Calendar**

<b>October</b>	
Harvest Gathering	13-24
Michigan Food Stamp Challenge	13-17
Fall plant and harvest sale	14
Bosses Day	16
Lunch with Lisa Webb Sharpe	16
State Police Board Meeting	16

National Savings Week	19-25
Public School Employees Board Meeting	23
State Employees Board Meeting	30
Halloween	31
<b>November</b>	
Voices for Action 2008 Poverty Summit	13
Thanksgiving Holiday	27-28

**Dan Norberg, and Erica Quealy** have all participated with one of the strategic planning groups over the past year. Each person spoke on his or her experiences working together, identifying needs, and seeing that those needs made it into the 20 objectives that have either been met or are on the 2009 ORS Business Plan.

**Technology Update**

**Chantele Geisenhaver** and **Meg Leonard** covered the recent statewide M1 migration, providing the purpose and benefits of the project. They also addressed the project’s current status and next steps.

**Kim LaClear** provided current statistics on miAccount that included the following interesting facts:

- 23,587 users, including staff.
- 82,416 transactions or page views.
- 1,714 viewed pension statements.
- 708 tax changes.
- 469 reprints of 1099-R.
- 3,358 people viewed their address online.
- 1,439 people viewed their EFT/direct deposit information.
- 1,213 people viewed their tax withholding selections.
- 445 customers viewed or printed the income verification letter, saving about 3.7 staff hours.
- 469 customers viewed or printed a 1099-R form, saving about 11.5 staff hours.
- 710 address changes, saving about 8.87 staff hours.
- 598 EFT changes, saving about 5 staff hours.



In order to drive business to miAccount, member statements were delivered earlier than ever, allowing access to Member ID and registration. In addition:

- The [ORSCustomerService@michigan.gov](mailto:ORSCustomerService@michigan.gov) mailbox will be removed, driving questions to the message board.
- The online stand alone benefit estimator will be removed from member websites.
- Customers are encouraged to use miAccount when requesting a form from the website.
- The 1099-R will be available early and will be advertised in the October issue of *Connections*.

**ER Model Process**

**Anthony Estell** explained the elements of a model process and the appropriateness of using Employer Reporting as the first process to be examined. This is the starting point for members, and the wage, service, and contribution data from employers is used by almost every other process in ORS. Anthony then introduced the team members **Andy Kolp, Andy Oser, Tim Simpson, and Michelle Thompson**.

**DMB Survey Results**

**Tim McCormick** congratulated ORS for achieving 100 percent employee participation in the recent DMB Employee Survey. With the pace set by ORS staff, total participation in the survey by all DMB groups was raised to 75 percent. Tim pointed out two areas where ORS ranked the highest and two that were ranked relatively low. Click on the following link for a [complete report on the DMB Survey](#).

**Thanks to the planners**

The objectives and agenda for every ORS all staff meeting is decided by a team of people who represent each process. Congratulations to the fall all staff planning team for a great meeting: **Jennifer Carter, Michele Childs, Pam Kenney Garver,**

<b>Quick Links</b>	
•	<a href="#">ORS Member Website</a>
•	<a href="#">ORS Employer Website</a>
•	<a href="#">Knowledge Library</a>

<b>Commonly Used Acronyms</b>	
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
CSC	Customer Service Center
DB	Defined Benefit
DC	Defined Contribution
DIT	Department of Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council ( <i>Phil, Laurie, Tim, and Anthony</i> )
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
T&T	Tools and Technology
UAT	User Acceptance Testing

**Mary McGlashen, Dick Pennington, and Matt Torok.**

**Post-meeting Survey Results**

The survey results will be available in the October 24 edition of the *LookOut*.

**Call center survey**

CSC recently conducted a trial customer satisfaction survey to assess the contact center’s overall performance, and to compare results to previous annual customer contact surveys.

CSC Analysts **Linda Turner** and **Tom Zack**, along with BPD’s **Michele Childs**, contacted 50 randomly selected members by telephone. Members were asked about their expectations for quality of service, the knowledge and courtesy level of the representatives, and the overall quality of the service. CSC also welcomed customer comments. Most of the members reached were active public school employees, but a balanced mix of members and retirees were sampled as well.

“I think it’s important to contact members promptly following their call to ORS,” said Tom Zack. “The members were quick in relaying even the smallest of details that make or break customer satisfaction. These types of surveys help CSC stay up-to-date with evolving customer expectations.”

“We ran this trial to understand how much more value we could get from a survey that was conducted closer to the actual phone call,” said Laurie Mitchell. “We were very pleased with the results. In the next year we will work with CE to find a cost-effective way to conduct our surveys more timely.”

These surveys also give CSC the opportunity to act immediately on customer comments, urgent issues, and customer service expectations, a mission that CSC embraces.

Although the survey was not statistically significant, the member feedback is meaningful to CSC. [Click here to see some results of the 2008 CSC Survey.](#)

A special thanks goes to **Fred Doll** of CE for sharing his knowledge of past surveys, as well as **Michele Childs** of BPD for assisting with conducting the survey.



**Flu Shot Clinic**

The flu shot clinic will be held on Thursday, October 23, at the General Office Building, from 12:30-4:30 in Conference Room D. To schedule an appointment time, please send an email to **Travis Peake** at [peaket@michigan.gov](mailto:peaket@michigan.gov).

**Harvest Gathering**

The Michigan Harvest Gathering 2008 State Employees' Campaign gives you the opportunity help the more than one million people in Michigan who need the services of food banks.

This year's campaign begins October 13 and runs through October 24. Boxes for collecting nonperishable food items and pledge cards for tax-deductible monetary donations will be available in various locations with in the General Office Building.

**ORS to conduct CNEX study**

The 2008 Customer Needs and Expectations (CNEX) study is scheduled to be mailed October 16. Approximately 4,000 surveys will be mailed to active members

and retirees in the state employee DB and DC plans. A follow-up mailing will occur on approximately October 29 to those who have not responded to the first.

This survey is different from the telephone survey being conducted by EPIC/MRA for ING. Both studies used random samples; however there is a possibility people could be on the list for both studies.

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## New State & State Police Insurance Rates and Insurance Applications

Previously, state and state police retirees have shared the same insurance rate sheet and group insurance application. For 2008-09 the State retiree and State Police retiree subsidy percentage differs, requiring changes to the *Insurance Enrollment/Change Request* form and the *Insurance Rate* sheet.

Beginning October 6, state and state police retirees will have different insurance applications and rate sheets. The only difference currently between the *Insurance Enrollment/ Change* forms is the form number noted in the lower left-hand corner: [R0452G](#) for state retirees and [R0452H](#) for state police retirees. This will allow us to provide system-specific language in the future.

The new [State Insurance Rate sheets](#) and [State Police Insurance Rate sheets](#) will be included in the appropriate insurance and retirement application packets generated in Clarety.

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## New DC forms and links added to member sites

The following forms are now available on the State Employees DC website:

- [Health, Dental, Vision, and Life Insurance Options \(R0423GH\)](#)
- [Group Insurance Application \(R0494M\)](#)
- [Retiree Group Insurance Eligibility Notice \(R0517G\)](#)
- [Insurance Rates \(R0749G\)](#)

The [insurance vendor chart](#), located under the [Health and Dental/Vision Insurance](#) section of the public school employees website, has been updated to include EyeMed's website, phone number, and customer brochure. In addition, a web link for Medicare-eligible participants has been added for Health Alliance Plan.

The online print version of the [Insurance Information R0058C](#) sheet has also been updated to include EyeMed as the vision insurance carrier.



ORS welcomed three new members to CSC on October 6 - say hello to **Angie Parkhurst**, **Alvina Richardson**, and **Loleta Smith**.

**Angie Parkhurst** is a 2006 graduate of Central Michigan University, where she majored in family studies. She recently married and enjoys spending time with her husband and five-year-old daughter.

Leaving the Department of Community Health with nearly 18 years of state employment under her belt, **Alvina Richardson** is glad to join ORS. Outside of her

civil servant life, Alvina works as a cosmetologist and has been involved with the children's ministry at her church for 15 years.

While attending Baker College full time, **Loleta Smith** enjoys spending time with her children, ages 11 and 5. Loleta brings 10 years of experience in the insurance and finance industry to ORS.

The CE group welcomed back **Tawny Anderson** to the Detroit Office.



Angie Parkhurst



Alvina Richardson



Loleta Smith



Tawny Anderson

**Sandy Streb**, IT auditor for ORS, has accepted a position as an audit specialist with the Department of Lottery. Sandy's last day was October 3.

### Staff on the move

**Meg Leonard** has accepted the Process Lead position in Process Support.

**Connie Morse** has accepted the Customer Education BPL position.



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](mailto:ORS-LookOut@michigan.gov).

Here **Connie Morse** shares her positive perspective during troubling times.

In the last 24 hours, here's just a sampling of what I've been bombarded with:

- N.Y. Times news alert: "Stocks plunge. DOW under 8,600, down 40% since its peak one year ago."
- My IRA quarterly statement arrived—funds have tanked. (I can't bear to look at my DC balance ....)
- SECC wants me to do payroll deductions.
- SECC wants me to purchase the right to go casual.
- SECC wants my pennies. And nickels, and dimes, and quarters. Even my hard-earned dollar bills.
- Harvest Gathering wants something every day of the week. Macaroni on Monday. Tuna on Tuesday. Soup on Wednesday. Thanksgiving fare on Thursday. Festive foods on Friday.
- Harvest Gathering wants me to purchase the right to go casual.
- Harvest Gathering wants me to bring enough beef stew to wage a war.
- Even EMPAC wants something from me.

Enough already! Don't they know state employees have been hit by these tough economic times, too?



Connie Morse

Don't they know that I need to go buy new casual clothes to cover the next three weeks?

"They" are the people, including the great volunteers in ORS, who are doing their best to help those who truly are suffering. To help those who aren't blessed with a steady job.

*I am very fortunate, and I know it. You are too. We have jobs—meaningful jobs—and health care for our families. Yes, times are tight, but I will be digging deep because I AM blessed. Take a minute to count your blessings, and I'll bet you will dig deep too.*

P.S. Something else crossed my desk—information on the Voices for Action 2008 Poverty Summit to be held in November. It's a statewide initiative to improve the lives of the half-million Michigan children living in poverty, and the nearly one in three of our fellow citizens who can't meet basic needs. Check out the Voices for Action website at [www.michigan.gov/poverty](http://www.michigan.gov/poverty). While there, take the Food Stamp Challenge (try living on what food stamps recipients live on for a week, starting October 13. Yikes.) The governor and some key state departments are partnering on the Poverty Summit, and they're looking at all of us for support. If you have any ideas on what ORS can do to increase awareness, let's talk! Call me at 2-6861 or email [morse1@michigan.gov](mailto:morse1@michigan.gov).

## Longevity award recipients

The EPC recognized and celebrated ORS staff who reached 5, 10, 15, and 20 years of service to not only the Office of Retirement Services, but to the State of Michigan.



*Back row (left to right):* **Tim McCormick**, **Sean Evens** (5 years), **Terry Rideout** (10 years), **Joyce Weber** (15 years), **Eve Baumgart** (20 years), **Cindy Mooney** (5 years), **Aimee Ross** (5 years), **Phil Stoddard**, and **Anthony Estell**. *Middle row (left to right):* **Laurie Hill**, **Laurie Mitchell** (5 years), **Kristine Morris** (20 years), **Anne Watros** (20 years), **Charla Drysdale** (5 years), and **Peggy Shinn** (20 years). *Front row (left to right):* **Michelle Thompson** (20 years), **Jennifer Dunavant** (5 years), **Taylor Stiles** (5 years), **Lois Musbach** (15 years), and **Erica Quealy** (5 years). *Not pictured:* **Tony Contu** (10 years), **Erik Ferden** (20 years), **Raymond Fleming** (10 years), **Kathleen O'Connell** (20 years).

## Please welcome your new EMPAC team!

**Rosemary Baker** from CE, **Lisa Barrone** from ER, and **Matt Torok** from CSC recently joined your fun-at-work EMPAC team. This week new officers were elected to serve for the next year: chairperson **Leza Rebera** from BPD, secretary **Pam Ward** from PS, treasurer **Mary Anderson** from CSC, and member-at-large, **Ann**

**Schneider**, rounds out the team. Look forward to more fun at work activities as your new EMPAC team prepares for the upcoming year!



Mary Anderson



Rosemary Baker



Lisa Barrone



Leza Rebera



Ann Schneider



Matt Torok



Pam Ward

Special thanks to **Angela Bryan**, **Robert Glennon**, and **Suzanne Wright** who recently completed two years of service on EMPAC.

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## miAccount wins award

The miAccount website was presented an award as the Best Application Serving the Public from *Government Technology* magazine. **Rose Wilson**, DMB Senior Chief Deputy Director, accepted the award on October 9 at the Digital Government Summit held in Lansing. miAccount was recognized as the best new application to directly deliver services more efficiently and effectively to the public.



Above: **Anthony Estell, Rose Wilson, Laurie Mitchell, Laurie Hill, Sriram Rao, and Anup Popat** at the Digital Government Summit.

## Kudos to Staff!

Thank you to **Andy Kolp, Dan Norberg, Linda Reznick, and Pam Ward** for your assistance yesterday in working through the power outage issues. You provided excellent support to ORS staff, and timely information to the IMT in order to plan and make decisions.



**Fred Doll:** Nice Job on the CNEX study mailing!



**Michele Childs:** You do a great job Ms. Head Monitor. I know this is all very time consuming; creating maps, making first aid kits available, recruiting and directing monitors as well as helpers such as Travis, keeping me in line when I want to take charge (ha ha) and all that this entails. Having done similar organizational activities, I know it's important to be recognized

for your time and effort. It is appreciated! You make ORS a wonderful and safe place to work. Don't ever retire!

**Rosemary Baker**, I want you to know how much I appreciate your attention to details. It's important and comforting to know that someone is always making sure the bases are covered and communicating the information to the right folks! Forms continue to grow in importance at ORS, and your background and experience is critical to our success! Great work!



**Jon Seeger**, I think I'm more excited for your vacation than I was for my own. Why? Because it's so clear how hard you work, how patient and giving you are with so many many demands on you, and because darn it, you deserve it more than anyone I know. I hope every minute is an ORS-free joy. I also hope when you return there is nothing in your email box or your to-do list. Have a great time.

**Lisa Schmidt**: Thanks for keeping us informed and updated as things change. Your dedication to this effort has a positive impact on all of us here at ORS, GOB, and all of our visitors.



**Mike Goodman**: A member greatly appreciated the excellent customer service she received. Thanks!

**Kim LaClear** is extremely knowledgeable and was very helpful in acclimating me to your miAccount site. She is a great ambassador for ORS. Thanks.



**ORS**: I received my first pension check today after retiring from Henry Ford College August 1. The whole process, from the orientation to the application process, was very well organized. Your people have been more than helpful, pleasant, knowledgeable, and professional. Thanks so much for all of your help.



**Cindy Mooney**: You and your staff did a great job of being proactive with this issue. Ford gave us some experience no doubt about it, but you quickly responded. I'm sure the retirees felt comfortable knowing that we were "all over the situation"

**Customer Education:** Thanks for stepping up to make this work, while continuing to provide CE's unique and exceptional services. It's great to have such unqualified confidence in professionals like you. Thank you - CE RULES.

A MPSERS member commented that **Betty Jones** is not only organized and full of facts but quick to find out the things we needed. She is terrific and very professional. Great Job Betty!



**Pam Garver**, you were the hit of the party. Thanks for sticking your feet in the fire and heading up there. Nice job Pam!

**Steve Crippin:** The letter is great. Nice going!



A customer commented that **Tawny Anderson** is the ultimate professional. She really knows her stuff and is a wonderful person.



**Pam Ward and Linda Reznick:** The triggering of the Disaster Recovery Plan created a myriad of tasks to be done. I want to thank both of you for all you've done to keep us moving forward, to get answers from facilities, to communicate with staff, and to ultimately throw us out of the building when we needed to leave. You did a great job.



A SERS member attended a seminar recently in which **Josey McCloud** was the speaker. The member went out of her way to say that Josey was excellent. She was very impressed and grateful for her presentation.





Thank you, **Ann Watros** for providing outstanding customer service. You handled a difficult situation with ease and made a customer very happy. Way to go!

**Ray Fleming:** Once again, you dazzled me with your ability to stay calm, stay flexible, think on your feet, find fast solutions, and let customer needs drive your decisions. While attempting to conduct a SERS webinar this morning, you realized that customers could dial up in order to hear your voice, but not log in to see the presentation. It was supposed to start at 10:00 am; at 10:05 I found you with a phone in each ear, and you were also making fast arrangements with CE staff to place your PowerPoint presentation on our website so viewers could navigate to it and follow along. You diagnosed the likely cause of the problem (server or or dial-up issues at the user's end). Ultimately, you were able to conduct a presentation using just voice along with the publications attendees had on hand. From what I hear, it was effective and our customers got what they needed. Great work Ray - I thank you, and so do our customers!



I have worked with **Brenda Morris** on a few occasions and I always thought she had a good work ethic. Last week, I was having computer problems and she came right over and fixed it for me. I was also fumbling for handouts and she was right there guiding me. Yesterday, I told her how much I appreciated her efforts because it got very busy. She held down the fort: getting people in and registered, contacting supervisors for help, and most importantly getting people what they needed. She was literally my right arm in a trying time. I know we value our temporary staff and want to hire them in. Brenda is no exception. She really deserves our thanks and praise for her excellent work.

Thank you to everyone on the **Health and Safety Specialty Team**. The salad luncheon was great, as always, and pretty healthy to boot! It's wonderful to know that we have a great group of folks willing to provide reminders to keep us on a healthy track. I personally appreciate the effort you all put in! Thank you so much.

I am writing because I believe it is important to acknowledge professional excellence. I am referring to Ms. **Mary Lowry**. I am in the process of retiring and have encountered a number of "speed bumps" in the process of setting up survivor benefits for my special needs daughter. I want to make sure she is provided for after my death and I encountered one snag after another. As you might imagine, it has been a somewhat stressful and concerning process because the stakes are high. Over a period of several weeks and multiple phone calls, Ms. Lowry was supportive, empathetic, patient, and very competent. Frequently, when dealing with institutions involving financial arrangements and benefits, I have had to deal with long waits on automated systems and the need to tell my story over and over as I get passed along through a series of impersonal employees. Ultimately, I felt like a social security number rather than a person with a problem that needed to be resolved. Ms. Lowry helped me feel like there was someone I could call on for help who understood my situation and cared whether or not I got things set up properly for my daughter. She told me she was "just doing her job." I have no doubt Ms Lowry is equally competent and patient with every person who calls her! Ms Lowry is a credit to the retirement office.



**Vision ORS planning team:** What a wonderful job everyone did planning and contributing to today's Vision ORS Celebration event. It was apparent that a great deal of time and care went into this event. I think the video in particular helped set the tone of the beginning, middle, and end of the journey and we all benefited from the events at hand. Thank you for your time and energy. Job well done, it went off without a hitch!

Laurie from the Northwest School District wants everyone to know that **Catherine Jones** handled a very difficult call from a customer. The customer is in a layoff status and was insistent about receiving a refund of his contributions. Laurie said Catherine was professional in explaining the reason why he could not take a refund of his contributions. Way to go Catherine!



**Elaine Scott and Taylor Stiles** are my heroes! The same goes for all of your staff of course. But seeking out solutions for the sake of the customer, as you both did this morning, is excellence and teamwork at its finest. Thank you so much.



A member wanted **Katie Lum** to know how wonderful she was yesterday. She really appreciated the help.

**Robert Glennon:** Thank you so very much. I really appreciate your talents and having you as my knowledge partner.



**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 Management and Budget, State of Michigan

Director:  
Phil Stoddard  
Edited by Customer Education

Kudos to the **Process Support** staff for their role in the power outage!



**Travis Peake** seems so responsible and mature. Any time I've needed him to help with anything, he has always been very courteous and easy to work with. He has also made this computer conversion process easier. Your area and ORS are lucky to have him.

Thanks for reading!!

**Betty Jones:**

Sept 18, 08

Dear Ms. Scott

I am writing this  
THANKFUL letter to you re. your  
amazing employee ms. Betty Jones

I'm a teacher who had some  
fears re. retirement. Betty was  
so professional & knowledgeable - She  
answered ALL of our questions - included  
ones we did not know we had

I'm now safely in the process  
Betty is not only organized & full of  
facts - She's quick to find out things we  
need - AND the computer system is done  
today. She is terrific & very professional!



**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.