



May 19, 2000

Volume 3, Issue 21

**ORS Mission:**  
We deliver pensions related benefits and services to promote the future financial security of our customers.

**ORS Vision:**  
Fast, easy access to complete and accurate information and exceptional service.

## ORS Calendar

### May

ORS Auction ----- 24th  
Pension Paydate ----- 25th  
State Employees Board Meeting ----- 25th  
Memorial Day ----- 29th

### June

Public School Employees Board Meeting ----- 15th  
Pension Paydate ----- 23rd  
State Employees Board Meeting ----- 29th

### July

Independence Day ----- 4th  
All-Staff Meeting ----- 13th

## Process Fair gets good evaluation

Educating staff about the progress of Vision ORS and the whole concept of ORS as a Business Process organization was a challenge that a team of Business Process Owners (BPOs) accepted prior to the last All-Staff Meeting. The result was a fun, interactive approach to learning – the ORS Business Process Fair.

But, was it effective? To determine this, ORS Director, **Chris DeRose**, distributed a Process Fair Survey to staff after the meeting. The results of the survey will help the Leadership Team evaluate this latest effort, and gain insight for future communications efforts with staff.

An average of 28 percent of ORS staff responded to the survey. Participants were asked four questions to solicit their opinions on the best method(s) to communicate information to the staff and rate their experience of the All-Staff Meeting and Business Process Fair.

Overwhelmingly the participants rated written communications as the best method to inform staff. The top two choices, e-mail from the ORS Director/Leadership Team and the *LookOut* newsletter, ranked equally as preferred options. The All-Staff and regular unit meetings

*See Process Fair survey on Page 2*

## Judges DC Plan issues resolved

ORS has reached a tentative settlement involving a lawsuit brought about by the Judges regarding their Retirement Plan options. Trial and Probate Judges filed this class action lawsuit in Federal District Court in 1998. The lawsuit centered on the terms of the Judges' election to transfer from the Defined Benefit (DB) Retirement Plan to the Defined Contribution (DC) Retirement Plan.

As part of the settlement, a 60-day election window will be open for eligible Trial and Probate Court Judges. The election window will

open June 1, 2000 and close July 31, 2000. Informational materials and election forms will be sent on May 15, 2000, to all current and former Judges Retirement System members named within the class.

Judges remaining in the Defined Benefit Plan will have a default 100% survivorship option upon vesting, similar to the survivor option in the State Employees' plan. In addition, those who remain in the DB Plan may be eligible for a future buy-in election,

*See Judges issues resolved on Page 5*

## Updated Reporting Instruction Manual mailed

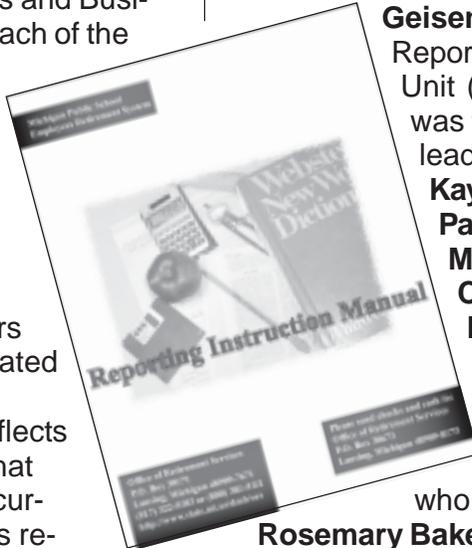
The latest revision of the Public School Employees' *Reporting Instruction Manual* was mailed early last week to Payroll and Personnel Officers and Business Officials at each of the Reporting Units.

Last June, the entire *Reporting Instruction Manual* was extensively revised. This time, only three chapters needed to be updated and distributed.

Chapter 3 now reflects the changes in what compensation is currently classified as reportable versus nonreportable. In Chapter 5, the references to submitting paper reports were removed. And Chapter 7 was rewritten to include the instructions for using the new Member Inquiry System,

which takes the place of the obsolete School Inquiry Dial-Up System.

Thanks go to **Chantele Geisenhaver** from Report Processing Unit (RPU), who was the project lead, along with **Kay Johnston, Pat Jorae, Mary Picken, Carla Price, Kim Pulido, and Annette Ruiz**, all from RPU,



who helped edit; **Rosemary Baker** from the Communications Unit who handled the layout and on-line editing of the document; **Matt Beha** from Communications, and **Amy Betts** from Finance and Administration, who coordinated the printing and

mailing of the updates; and Student Assistants **Stephanie Buntin** from Customer Service and **Amanda Schoeler** from RPU who prepared the materials for mailing. BPO **Kathy Tober** served as overseer of the project.

If you need a copy of these updated chapters, add your name to the **RIMUpdate.doc** file in **FSRetirementShared\General** and a copy will be sent to you.

### Thought for the Day

You will never stub your toe standing still. The faster you go, the more chance there is of stubbing your toe, but the more chance you have of getting somewhere.

— **Charles F. Kettering**

### Process Fair survey

*Continued from Page 1*

came in a close second behind these two.

Respondents were asked to rate how much their understanding improved regarding the New Foundation, the ORS efforts to become a processed-based organization, and Vision ORS, after attending the All-Staff Meeting. On average, the participants rated their experience a 3.8 on a scale of 1 (not improved) to 6 (greatly improved). The Business Process

Fair was rated a 3.9 on a scale of 1 (not useful) to 6 (very useful).

Overall, the participants felt that the Business Process Fair was a great way to expose the staff to the Business Process Owners (BPOs) and business process concepts. In addition, participants have a desire for more details and explanations about how becoming a business process-based organization and Vision ORS will affect their individual duties and responsibilities.



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## ***Change Agent recommendation improves efficiency***



Storage of closed Administrative Hearing files is being moved off-site, thanks to a recommendation from the Director's Office Change Agent group. In the past, for each Administrative Hearing case, ORS retained a comprehensive file containing supporting documentation, hearing transcripts, Proposals for Decisions, exceptions, Board orders, Court orders, and so on.

The Attorney General's office, Retirement Division, also kept its own comprehensive copy of the file. Following individual department's records retention schedules, the AG and ORS both kept their sets of files for many years after the cases were closed.

The Change Agent group reviewed the existing process

of maintaining these records and determined there was considerable duplication of efforts. They recommended reducing the time closed hearing files would be held at ORS and transferring the responsibility to the AG's office for handling the retention of these records.

As a result of the group's recommendations, ORS will keep closed hearing files on site for only six months, unless the case is appealed to Circuit Court, which would require keeping the file until all court orders and appeal rights are completed. ORS will no longer send closed hearing files to the Records Center for storage. Only a few select items will be copied from the closed hearing file to be included in the member's working file prior to confidentially recycling the hearing file.

On the AG's side, their copy of the closed hearing file

would be retained on-site for three years, then sent to the Records Center for an additional 22 years.

Less storage space will be required within ORS and at the Records Center where duplicate copies of these closed hearing files were stored; and ORS staff will not spend additional time preparing the files for filming and retention. If a closed file is needed in the future, it can be accessed easily from the Records Center, usually with a turn-around time of one day or less. In the end, the remaining copy of the closed hearing file should be more complete and organized.

**Janet Darling, Terry Jacobson, Jaime Mosley, George Urban, and Pam Ward** drafted this recommendation, coordinating their efforts with **Dave Balas** and **Sheila Parsons** from the Attorney General's office. Congratulations to all for a job well done!!

## ***Walkers help Habitat for Humanity***



On May 7, **Ann Beach, Carol Keyes Baubie, and Lisa Schmidt**, all from Finance

and Administration, participated in a Habitat for Humanity fund-raising 5K walk through Lansing neighborhoods where Habitat homes now stand.

Together these ladies raised \$226, which, combined with

the money raised by fellow walkers, will stay in the local Lansing area to help with future Habitat for Humanity projects. Last year this walk brought in over \$10,000. This year's totals are yet to be announced. Way to go!!

# SPOTLIGHT

on Carol Keyes Baubie

ORS has a budding lighthouse expert in our midst – Carol Keyes Baubie from Finance and Administration. Last month, Carol placed second in the General Office Building’s “Name the Lighthouses” contest to identify the various Michigan lighthouses in the photographs displayed in the second floor hallway. She was able to correctly identify 10 of the 12 lighthouses.

Carol’s interest in lighthouses has a note-worthy history. “I started collecting lighthouses when I was 12 years old and visited the Mission Point lighthouse. Family lore has it that my great, great, great grandfather tended the light in the Mackinaw City lighthouse, thus my love for them runs in my blood.

**Don't forget the EMPAC Auction next Wednesday, May 24. Bring your edibles and your collectibles to Conference Room M to auction off, then come back between 8:30 and 3:30 to place your high bid on the items of your choice. Proceeds go toward the ORS Picnic and other EMPAC activities.**



“Since that first trip to Mission Point, I’ve continued to add to my collection over the years – but only those that I have been to. My collection includes lighthouses from Michigan and along the East Coast.”

Carol is even able to relax and enjoy the view of *real* lighthouses when she’s at her house in Empire. From there, she can see two lighthouses on a clear day.

As she’s learned more about lighthouses, Carol has discovered that Michigan has more lighthouses than any other state - 124 of them, all along the 3,200 miles of Michigan’s coastline. Fortunately, many of these old lighthouses have been restored rather than destroyed, so all of us can continue to enjoy their stately existence, thanks to the preservation efforts of several different organizations.

## Answer to last issue's Scramble

het lyon traince samen fo scescus  
si ot drener rome dan treteb crivese  
nath si dextecep fo oyu!

The only certain means of success  
is to render more and better service  
than is expected of you!

## ORS web site rated as one of Top 10 retirement sites

The ORS web site recently received an unexpected “pat on the back” from Acuent, Inc., an East Coast web site development organization. Acuent is working with the State of Delaware Office of Pensions on a complete overhaul of their current retirement web site.

Acuent reviewed over thirty different retirement systems’ web sites, looking at visual presentation, ease of navigation, the specific content on the pages, and links (if any). Company representative, Robert Pitney, told ORS:

“We have judged yours to be one of the country’s

top ten state retirement systems web sites. We found your site to have many of the characteristics that we would want included in the site we are currently developing for Delaware. In fact, we have been so thoroughly impressed by what you’ve put together for your constituents that we were hoping you might share some of your experience with us as we begin the process of developing Delaware’s new site.”

It’s nice to hear occasionally how well our web site stacks up against the other retirement systems’ web sites.

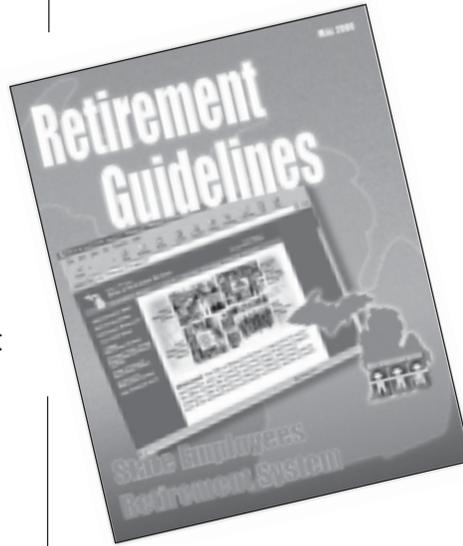
## New State Employees Guidelines available

The latest edition of the *Retirement Guidelines* for State employees, the May 2000 version, is hot off the press. With inventory of last July's edition running low, ORS staff was asked to identify areas that needed updating or could benefit from additional clarification in the revision.

Some of the more important changes in the new edition include the following:

- Removing the Waterford office references
- Updating the Holland telephone number
- Specifying more clearly who is eligible to participate in the Defined Benefit Plan
- Identifying the timeframe during which a nonduty

disability application must be submitted



- Adding information about earnings limits for disability retirees
- Updating Service Credit purchase information regarding eligibility and vesting issues

- Expanding the information on insurance benefits and eligibility
- Adding deferred members to those covered by EDRO legislation
- Modifying the Equated Plan graphics to better reflect how the plan works

If you get requests for additional copies of the State Employees *Retirement Guidelines*, please contact **Charla Clifford** or the Customer Service desk.

Looking ahead, Communications staff is always seeking additional improvements for the *next* State Employees *Retirement Guidelines*. Any changes or recommendations can be sent to **Rosemary Baker** who coordinates these *Guidelines* revisions.

## Judges issues resolved

*Continued from Page 1*

allowing the entire judicial salary to be used to calculate a retirement benefit.

Efforts are underway to allow DB members and DC participants to contribute to an optional tax-deferred investment plan to cover post-retirement health care expenses. IRS approval for the buy-in plan and the post-retirement medical investment plan is pending, as are plans for implementation.

In response to another issue resolved by the settlement, a judge will be added to the Judges Retirement Board.

**Sandy Ball** and **Dan Norberg**, both from Operations, have been working closely with Assistant Attorney General **Dave Balas** and Special Assistant Attorney General **Alan Wilk**, throughout this settlement process to help draft the communications efforts to inform the Judges of the litigation results. Sandy and Dan have also been working on the implementation phase

of the settlement, in part by calculating actuarial present values (APVs) for each of the Judges to help them compare the two retirement plan options.

Dan and Sandy also drafted the materials in the informational/enrollment packet, with assistance from **Matt Beha** from the Communications Unit, who handled final layout and design for many of the forms and other materials and coordinated the printing. Thanks for all your hard work!

## Comings & Goings in ORS

**Amanda Huhn** is a returning Student Assistant working for the summer in Retired Accounts where she worked last year. Amanda just graduated from Central Michigan University with a B.S. degree in Psychology and Family Studies. Welcome back Amanda.



Amanda Huhn



Jan Richards

Retired Accounts also welcomes **Jan Richards** who comes to us from ProTemps. Jan retired in 1997 from the Department of Consumer & Industry Services where she worked for Liquor Control. She will be helping with death processing.

**Clarissa Sheler** joined Finance and Administration on Monday, May 15, as a new General Office Assistant working in the mailroom and microfilm. Clarissa comes to us from Lowe

Brothers & Dad in Charlotte, where she worked for the past 12 years.

Information Technology & Reengineering bid a fond farewell to **Sheila Patterson**. Her last day was May 12. Sheila has a new position in the Department of Transportation.



Clarissa Sheler

## Updated Policies and Procedures



Check out these new and/or revised Policies and Procedures. You can find them in the pol\_proc directory in the FSRetirementShared@DMBRetirement2.

### New Procedure:

**ORS73** Granting Proxy to a Mailbox

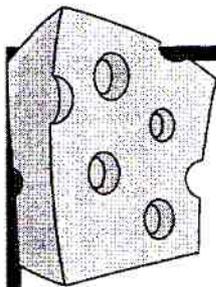
### Updated Procedures:

**FA25** Records 3A Sorting Incoming Mail into General Categories

**FA47** Pulling Microfiche in Records 3A

**OPER161** Using the Excel Earning Limit Program

**ORS31** Sort Correspondence by Last Four Digit System



## The Cheese Corner

Maybe you thought ORS was the only outfit reading "Who Moved My Cheese?", the book that Director Chris DeRose introduced us to a few months ago. Wrong! The book has been on the *New York Times* Best Sellers list for 24 weeks, even enjoying several weeks in the number one spot!

The book, as you know, offers ideas for dealing with change. Often, dealing with change means looking at things in a new way. Here are some brain teasers to help stretch your thinking!

welieight

running home

O\_er\_t\_o\_

yaplayrd

"derful"

The answers will be published in the next issue of the *LookOut*.

