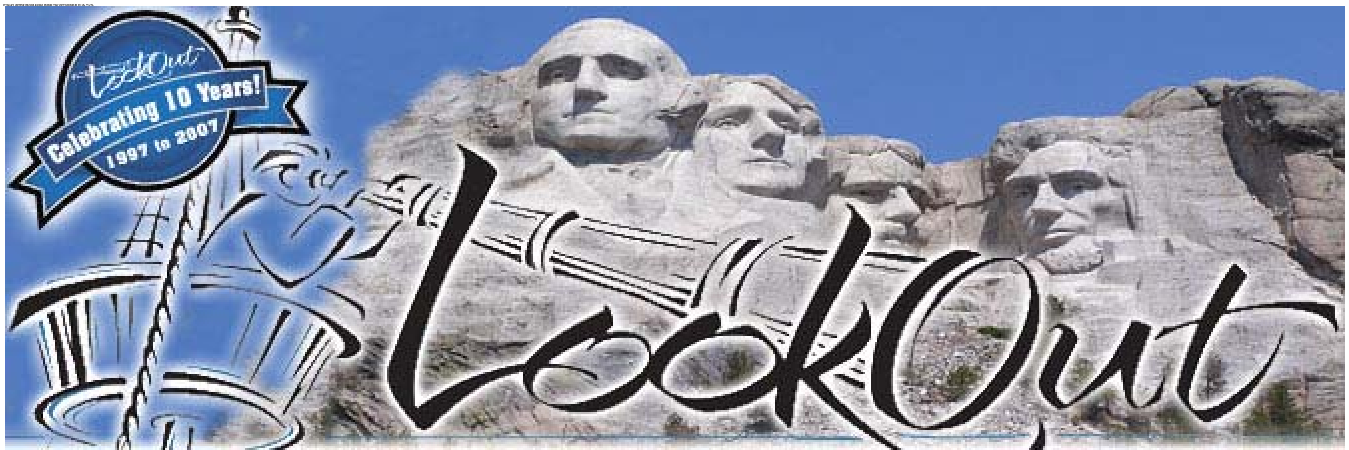

February 16, 2007 Volume 11, Issue 4

Email the LookOut Staff LookOut Archives

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DMB announces a new director for WDRA

Phil Stoddard

DMB Director **Lisa Webb Sharpe** announced that **Phil Stoddard** was appointed Senior Deputy Director of WDRA. Phil has been serving in this role on an interim basis since October 2006. Prior to that, Phil served as Director of Operations and then Assistant Senior Deputy Director here at WDRA. *Congratulations, Phil!*

Look for a more thorough history of Phil's career in a future *LookOut* issue.

Annual CitiStreet review shows promising improvements

On February 1, **Sandy Ball**, **Lynne Bemrose**, **John Davidson**, **Elaine Lewter**, **Brian McLane**, **Joe Ostentoski**, and **Phil Stoddard** met with seven CitiStreet representatives for the annual review of CitiStreet accomplishments and to set up a 2007 Business Plan.

WDRA uses an extensive performance evaluation tool to assess 55 different CitiStreet services; using both quantitative and qualitative measures. Evaluation tools include the following:

- cost effectiveness management survey
- EPIC-MRA (Educational, Political, Industrial and Consumer Market Research Analysis) annual Defined Contribution (DC) participant survey
- Plante & Moran audit
- special reports by Segal
- CitiStreet's quarterly service review

The services reviewed are the website, phone services, brochures, newsletters, statements, distributions, payroll processing, investments, fees, and special requests. Each category is rated on a scale of 1 to 10 with 10 being highest. CitiStreet's average score for 2006 was 8.3, an increase over the 8.1 score for 2005.

The DC plan highlights showed a 10% participation increase over the past five years. In addition, there has been improved investment diversification by DC participants as shown by a decrease in the use of the Short Term Investment Fund

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On the Horizon

- Spring 2007 All Staff April 17, 2007
- Blood Drive - April 25
- Blood Drive - June 20
- 9th Annual Tiger Baseball Outing - June 26

Quick Links

- ORS Member Website
- ORS Employer Website
- Policies and Procedures

Commonly Used Acronyms

AST	Application Support Team
BLA	Business Leadership Assembly *(Consists of the EPC, BPOs, and BPLs)*
BPD	Benefit Plan Design
BPL	Business Process Leader
BPO	Business Process Owner
CED	Customer

from 47% to 12% in five years. These great improvements were the result of a creative quarterly postcard campaign, automated web site messages, and personal phone calls/emails to new employees.

Review of the 2006 accomplishments also credited successes of improvements to the website (new calculators, web tutorial, and the option to create a personalized user ID instead of using your social security number) and quarterly statements (adding beneficiary information to ensure members have the correct beneficiary designated for each plan).

After a thorough review of accomplishments the group went on to set the following goals for 2007 for the partnership of CitiStreet and WDRA:

- develop and implement the Employee Retirement Savings Initiative (a WDRA priority that could include auto-enrollment, auto-escalation, and improved default investments);
- continue emphasis on increasing plan participation and diversification of investments to allow retirement accounts to grow faster and result in better payments at retirement;
- combine all DC plan benefit information into one source for the CitiStreet call center, web site, and plan publications; and
- redesign the newsletter and publications to generate increased awareness and understanding of the plans.

It will be an exciting year with all of these activities going on. Any questions regarding the plans can be directed to Lynne Bemrose, John Davidson, Elaine Lewter, or Joe Osentoski.

What do our members think?

The results from the third annual active member survey are in and tabulated. So, what do our members think of our services? ORS received an overall satisfaction rating of 80.9 percent.

This was the first time we offered to let our members complete the survey online instead of sending in the paper copy they received in the mail. About 14 percent chose the option of completing the survey online, a number we hope to see grow.

Along with measuring members' satisfaction level, other goals of the survey included identifying what media type members prefer and tracking members' awareness of ORS.

The following table shows the responses to the question "In the following list, please check each service offered by ORS that you are aware of:"

TYPE OF SERVICE	PERCENTAGE OF THOSE WHO ARE AWARE				
	OVERALL	**MPSERS**	**SERS**	**SPRS**	**JRS**
Website	66.0	53.0	77.2	61.6	69.6
Printed Publications	39.5	34.2	45.3	35.6	NA*
Benefit Estimating	39.3	29.7	55.6	18.6	36.2
Preretirement Seminars	58.0	39.3	73.5	54.2	NA*
Customer Service via Email	18.1	13.1	23.0	15.3	18.8
Toll-Free Telephone	33.6	31.0	37.7	23.7	46.4

	Education and Development
CSC	Customer Service Center
DIT	Department of Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council *(Phil, Laurie, Tim, Anthony, and Kathy)*
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
WDRA	Workforce Development and Retirement Administration

Pension Administration	22.5	12.8	27.0	22.0	40.6
Annual Member Statements	52.9	60.4	48.1	40.7	82.6
Service Credit Purchase Option	54.9	50.8	68.4	39.5	31.9
Personal Retirement Counseling	17.5	15.7	21.9	12.4	13.0
Health Insurance	22.7	21.4	28.4	15.3	13.0
Not Aware of Any Services	13.8	21.1	8.1	15.8	11.6

Surveys were sent to 4,132 randomly selected active defined benefit plan members. Because of the smaller number in the judges and state police systems, the public schools and state employees made up the largest number of selected participants. The response rate was 23.9 percent.

* Not Applicable. JRS members were not surveyed on these services.

Team produces speedy pension adjustments for State Police retirees

WDRA stepped up to the plate when House Bill 4735 was enacted January 3. The bill called for an increase in pension benefits for State Police retirees who accrued banked time hours between 1957 and 1963. This meant 672 retirees were owed money after we recalculated their pensions.

Who was called to the plate to accomplish this task? From CSC, **Tim Droste** processed the payments and **Patty Wethy** audited the accounts; **Andy Oser** from BPD and **Shelly Baker** gathered data and completed actuarial evaluations; and from CED, **Kim LaClear** created and delivered letters to the retirees.

In just a few short weeks after the legislation passed in January, the team identified who was affected, sent letters to the retirees on February 2nd, and processed the payments.

This team's hard work and solid coordination maintained our integrity and commitment to great customer service.

Deadline for Excellence Awards nominations draws near

Is there a person who routinely goes the extra mile to ensure that projects are completed on time; someone who continually goes above and beyond to serve both internal and external customers; or someone who does his or her job with a smile all the time? Now is the time to submit a nomination form to recognize this special person for their efforts!

The deadline for nominations is March 1.

The nomination process is easier than ever before. Nomination forms can be found on the shared drive at: F:/WDRA Excellence Awards/Nomination Form.pdf.

Clarety Release 22 – Introduction to 3.3 C!

Clarety Release 22 will go into production the weekend of the 3rd and 4th of March. In addition to other changes, stage 3.3C of the Vision ORS project will introduce us to some basic screen changes along with some additional and enhanced functionality. Everyone who uses Clarety will be introduced in detail to the 3.3 C changes that will impact them at a team meeting or scheduled training. These changes will increase customer service and make life easier for WDRA staff.

Here is a brief description of the basic changes that staff will see in Clarety on Monday, March 5.

Additional tracking features will be available for activities within each workflow from March 5 forward.

- The system will track the status of the activity, the begin and end dates, and the staff member working on it.
- The system will contain pre-defined service levels that take holidays and weekend into consideration and will auto notify the supervisor and staff if defined timeframe for an activity has elapsed. For example, it will tell us if a service credit billing is taking too long to complete.
- The new functionality will notify staff if an activity in the workflow queue is time sensitive.

Enhanced search function and column locations

- The ability to sort will be expanded.
- The order of fields will be changed.

Additional information for member billings screens

- Additional columns will document the history of changes made.

Conditional audits

- We told the system which workflow types should be subject to audit. The system will randomly select individual customers from within these buckets to send to the audit queue.
- The system will place notes in the system if an item was chosen for audit indicating why it was chosen.

GBE (Generate Benefit Estimates)

- Duplicated information is being deleted.
- Screens are being cleaned up to make them easier to read.

Reminder: Phone Resource Tool

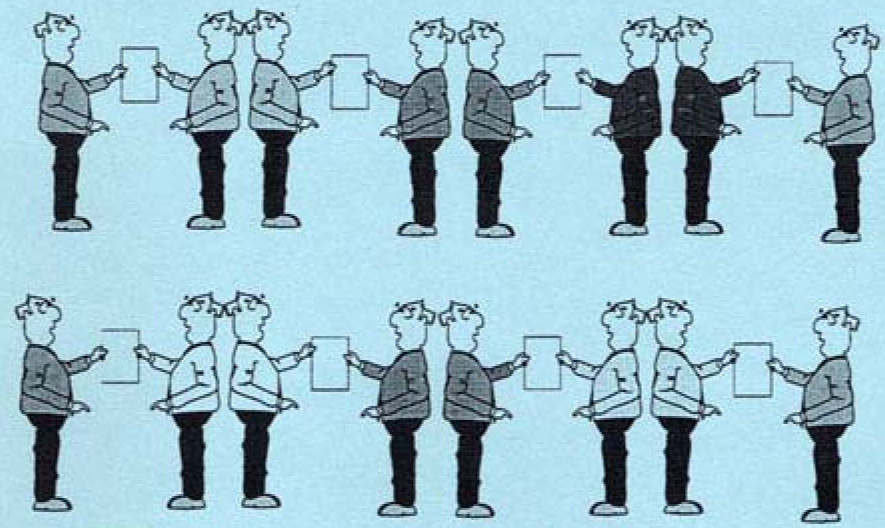
Please take a moment out of your busy schedule to check over your information in the Phone Resource Tool and update it as necessary.

The tool is located on the Public (F:) drive at F:/Process Support/Phones. Once there click on Phone_ResourceTool.mdb.

A blast from the past

Lookout articles from this week in 1998:

February 13, 1998



Eliminate hand-offs!

Improve efficiency by reducing hand-offs

Where do hand-offs originate and why do they exist? A hand-off usually is born when someone seeks temporary assistance to help with a backlog of work.

The handed-off portion of the work process is usually a simple task which requires minimal training and few or no special skills to complete, so it is easy for anyone to learn how to do it.

However, as the workload increases, more and more tasks are handed off to more people, and the work process expands. Very soon, the hand-offs change from a temporary feature to institutionalized features of the process.

By handing off parts of the work process, the "hand-offer" believes he or she will be able to get more accomplished. Unfortunately, along the way, the "hand-offer" gives up control of the whole work process. Because the person hasn't done the tasks himself, the tasks need to be checked and verified to make sure they were completed, and the results are correct.

Time is invested tracking and delivering the work from one

Continued on Page 2

ORS LookOut - 2 -

Reducing hand-offs

Continued from Page 1

person to the next. Knowledge, control and accountability for the entire process is often lost.

When one person completes the whole process alone, it isn't necessary to spend time checking someone else's work – it's known which parts of the process are done and which still need attention. Even if the project is set aside for a while, a quick review will refresh the mind. Familiarity is maintained along with control of the entire process.

ORS has several successful examples of how reducing hand-offs has decreased processing time dramatically and increased customer service. The Customer Information Center (CIC) was created to minimize the need to transfer or hand-off.

Before the CIC, many incoming callers talked with phone operators. They were able to answer some of the basic questions from callers, but generally the caller was transferred to one of the Automatic Call Distribution (ACD) lines.

If a staff member was not available, the caller would need to leave a message in voice mail and wait for a return call. If the staff member was available, but was trained to answer only some of the caller's questions, the caller was transferred to another staff member.

Now, rather than being passed from one person to another, incoming callers have the opportunity to speak with someone from the CIC who has been trained to answer a wide variety of retirement questions.

Eliminating hand-offs doesn't "just happen." To reduce or avoid hand-offs, the work process must be simple. In

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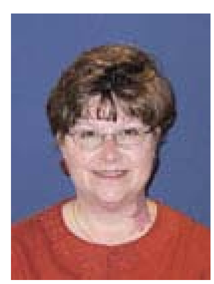
Sounding Out

by Linda Reznick

Audits



Linda Reznick

Long, long ago, in a place called Bureau of Retirement Services, there were a lot of audit procedures in place. In fact, in the area where I worked, everything that was given to a customer was reviewed or audited. Everything. We audited every billing, every estimate, and every piece of correspondence. Even retirement packets were not mailed until a second person reviewed the contents. Every packet was reviewed - not just a random audit. No wonder we got so far behind.

Over time, the world has sped up, and unfortunately we had to do away with some of our auditing activities due to the sheer volume of work that needed to be done. Thankfully, with the help of technology, auditing is making a comeback. We're not going to be going to the same extent as we did when I first started, however. We've made careful choices about what should be audited and what doesn't need to be audited so that we can maximize both our accuracy and our efficiency.

Why is auditing so important? There are the obvious reasons – it just makes good sense when you consider we are asking our membership to make decisions that will impact a third of their lives based on the information we provide them. We also know we are darn good at our jobs, and this will provide absolute proof of it.

But there are other things to consider, like earning public trust, documentation of transactions in case there are questions about them in the future, promoting efficiency, and ensuring our records are accurate.

Why now? Because technology is helping to make the process of auditing simpler, faster and more organized. The system will help us pick out the things that are important to audit. This helps us make sure that we're auditing transactions with critical impacts to our customers and not wasting our time in areas that shouldn't really require an audit.

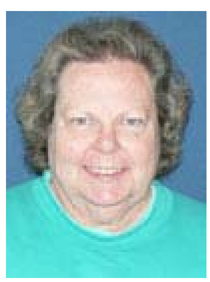
Will it cause more work? In some areas auditing will increase, and in some areas, it will decrease. We really think it will even out to about what we do now, but we really can't tell until the process goes into production.

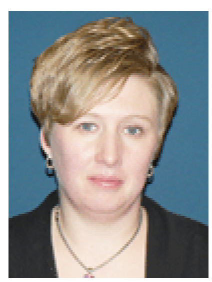
What does it do for us? It will help us make sure that the data on our system is more accurate. The audits along with the new tracking feature in Clarety will allow management to see exactly what is happening within each workflow in Clarety, allowing us to more accurately define our service level agreements.

Is it worth it? Darn right it is! As an employee of WDRA and as a customer of WDRA, I think it's a great move forward.

Comings & Goings

The CSC welcomes the following six new employees to the office.


Mary Crispin

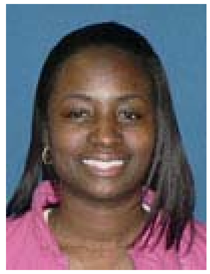

Kristine Jackson

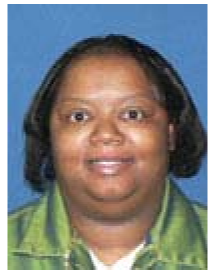

Aleah Lewis

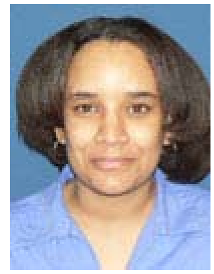
Mary Crispin, a life-long Michigan native, joined the CSC after spending many years working with her husband in their family-owned printing business which they are now in the process of selling to pursue other interests. She is married to her high school sweetheart, has two kids, and five grandkids. She enjoys traveling and hopes to see as many of Michigan's lighthouses as possible.

After working for Property Options, a company that helps people in foreclosure, **Kristine Jackson** joins our staff. She lives in Lansing with her four children, Lexus, Jasmine, Demen, and DeAndre.

As a student at both Lansing Community College and Michigan State University, **Aleah Lewis**, is working toward her Post-Bachelors certificate as a Paralegal and aspires to become an attorney. She has worked in customer service for four years as an intern at Dow Chemical, as well a variety of clothing stores. Aleah is 21 and has two younger sisters, age seven months and six years old. In her spare time she likes to read, swim, play basketball, and hang out with friends.


Dennett Davis


Alethia Thomas

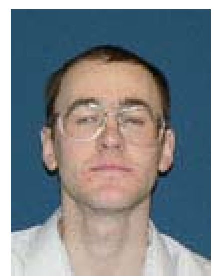

Mary Motley

After working at the Michigan State Disbursement Unit **Dennett Davis** joins the WDRA insurance staff with experience in customer service. She is currently working on her bachelor's degree in child psychology at Lansing Community College and will transfer to Michigan State University next year to finish her studies.

Outside of her time at work **Alethia Thomas** volunteers for the Court Appointed Specialist Advocate group for kids in Eaton and Barry County. She is a certified phlebotomist and EKG Tech and has taken classes at Career Quest and American Medical Careers. She enjoys sewing, traveling, and loves to shop.

Mary Motley a graduate of Eastern Michigan University and Cleary University, joins our office with five years of customer service experience. Mary also spent four years in the mortgage industry. She enjoys reading, shopping, and cooking.

Aaron Usher joined PS on February 14 and will assist in the records area. Aaron attended Bowling Green State University where he obtained his bachelors degree. He then went on to Michigan State University to get his masters degree. He has previously worked for Michigan State Police and is a winner of the 2004 Glass City Marathon (Toledo, OH).


Aaron Usher

PS is pleased to announce that **June Holbrook** accepted a permanent position on February 12. June will continue to work in the records area.

CSC said goodbye to two staff members, **Jennifer Morrisey** and **Tina Pakkala**. Their last day was February 9.

Kerrie Vanden Bosch accepted a position in Benefit Plan Design. For the immediate future, she will be fulfilling her current role as BPO of CED as well as transitioning into her new role.

President's Day February 19th, 2007

Until 1971, both February 12 and February 22 were observed as federal holidays to honor the birthdays of Abraham Lincoln (12) and George Washington (22).
In 1971 President Richard Nixon proclaimed one single federal holiday, the Presidents' Day, to be observed on the third Monday of February, honoring all past presidents of the United States of America.

Some fun facts…

- President George W. Bush had a regulation T-ball field built on the South Lawn of the White House.
- In 1886, Grover Cleveland became the first, and only, president to be

married in the White House.

- The residence of the U.S. president was called the "President's Palace," the "President's House," and the "Executive Mansion," before Theodore Roosevelt made "White House" the official name in 1901.
- John Adams was the first president to live in the White House. George Washington rented houses when he was in New York and Philadelphia.
- President Theodore Roosevelt was the first president to ride in a car and the first to travel to another country when he visited Panama.

President George W. Bush and Commissioner Cal Ripken signal a "safe" for a player who took an unplanned slide as he ran toward them for his courtesy baseball and photo after a game of Tee-Ball on the South Lawn of the White House.

- President Franklin Roosevelt was the first President to ride in an airplane.
- The White House requires 570 gallons of paint to cover its outside surface.

Business Briefs

Retirement Times
Employer Newsletter

ER and CED published the latest edition of the *Retirement Times* newsletter to school reporting units on Monday, February 12. In addition to tips and reminders related to wage and service reporting, the newsletter included information about fiscal year '08 contribution rates, the new Payroll Advisory Team, and a summary of the most recent employer survey.

To review the articles, go to www.michigan.gov/psru and click on *Retirement Times* on the left-hand side of the screen.

Public School Employees Member Statements of Account

Most of the statements for public school employees were sent earlier this year. An additional 82,000+ statements that include TIF images (copies) of the member's Beneficiary Nomination forms are currently being mailed. The mailing should be complete by the end of next week.

Travel Vouchers

DMB and DIT have centralized travel voucher processing to protect employees' social security numbers and created new forms to reflect the change. These forms, DMB 23 and DIT 23, are on each department's respective intranet sites. We are reminded to take extra care when completing vouchers as Accounts Payable staff are not as familiar with us and the work we do.

WDRA Training

WDRA Training is offering several courses in the coming month:

Whale Done!
March 1, GOB, Conference Room B, 8:30-Noon, taught by Sandy Ball (FULL).

Self-Management
March 13, GOB Conference Room A, 8:00-Noon, taught by Sandy Ball and Michael Zingsheim with 3 seats available.

ORS Mission:
We are a customer-focused organization that serves members and employees today and prepares them for tomorrow.

ORS Vision:
Empowering people for a successful today and a secure tomorrow.

The *LookOut* is published by Workforce Development and Retirement Administration, Department of Management and Budget, State of Michigan

Director:
Phil Stoddard
Produced and Edited by Customer Education and Development

Thanks for reading!!

Introduction to Excel
Mid-March in the GOB. Details are still being arranged so watch the Training website by logging into the DMB Intranet.

Touchdown!

Angela Bryan (far right) awards $10 gas gift cards to Super Bowl football prize winners (from left) **Michelle Childs**, **Connie Morse** and **Penny Winston**. The pool was sponsored by EMPAC.

Note: Because some of the links in this newsletter point to resources within ORS, some of the links may not work if you are outside of ORS.