



January 30, 2009

Volume 13, Issue 2

[Email the LookOut Staff](#)
[LookOut Archives](#)

In This Issue...

- Implementation of fees for late retirement reports
- Celebrating success
- **business briefs**
- ORS Excellence Awards nominations
- Governor John B. Swainson Award nominations
- *Michigan Travel Ideas*
- **Comings & Goings**
- Look how our tools have changed!

Calendar

February

Super Bowl Sunday	1
Groundhog Day	2
Governor's Service Award Nomination Deadline	3
Lincoln's Birthday	12
Valentine's Day	14
President's Day	16
ORS Space Walk	19
Governor John B. Swainson Award Nomination Deadline	20
Washington's Birthday	22

Implementation of fees for missing or late retirement reports

In May 2008, ORS began working on a project to assess a \$50 fee effective January 1, 2009, to public school reporting units for any retirement reports that are submitted after the retirement report due date. ORS relies heavily on reporting units to provide timely wage, hour, and contribution data in order to provide customers with accurate billings, statements of account, pension estimates and payments, and actuarial projections.

ER is pleased to report that we have seen a significant decrease in the number of missing reports. Last May there were 114 reporting units with missing reports. Now, there are only 16. That's an 86% decrease!

There were 85 reporting units assessed fees on January 20, for a total of \$8,450. Of these, 69 had submitted all required reports, but beyond the due date of January 1, 2009, and 16 reporting units were charged fees for reports that were still missing.

The implementation of these fees will help to ensure that ORS receives wage, hour, and contribution data from reporting units on time. **Joanne Brown** of ER stated, "The impact of having the data reported sooner will be felt not just in ER, but downstream to many processes in ORS." From the customer service perspective this is great as it helps us provide better service to our members.

Celebrating success

ORS staff teamed up and toured the world of ORS to celebrate our 2007-2008 successes. Over three days, beginning January 20, ORS's version of the Amazing Race led staff to learn about accomplishments in each process while meeting new people along the way.

Soup for Super Bowl



MDIT organized the Soup for Super Bowl event, raising a total of \$2783.88 between the Detroit, Jackson, and Lansing areas for donation to the Greater Lansing Food Bank, the City Rescue Mission in Lansing, the Detroit Area Food bank, and the Jackson Area Food Bank. Thanks to soup donations and several hungry GOB staff, we contributed \$521 to the cause.

Central Perk Cleaning	25
March	
ORS Excellence Award Nomination Deadline	2
State Employees Board Meeting	5
Blood Drive	11
Public School Employees Board Meeting	12
Saint Patrick's Day	17
ORS Space Walk	19
First Day of Spring	20
Central Perk Cleaning	31

On the Horizon

- All Staff Meeting - April 21

Quick Links

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

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
CSC	Customer Service Center
DB	Defined Benefit
DC	Defined Contribution
DIT	Department of Information Technology
DMB	Department of Management and Budget

Processes chose countries to represent, and then put their creativity to work designing displays to showcase their successes.

On the final day, all the teams (more than 90 percent of staff joined in the fun!) came together for a final race to win the grand prize. **Amita Das** and **Jimmy Isaac** from AST, **Rosemary Baker** and **Kim LaClear** from Customer Education, and **Michelle Thompson** and **Mary Weaver** from Employer Reporting competed head-to-head in a test of ORS knowledge. Kim and Rosemary walked away with baskets filled with various Michigan-made products. After the final race each process shared treats from the countries they represented.

A special thanks goes to EMPAC for donating a sheet cake for the event, EPC for donating the grand prize, and the following process representatives: **Amita Das** and **Udiyan Korganji** from AST; **Kyle Seymour** and **Peggy Shinn** from Benefit Plan Design; **Lyndsay Aldrich**, **Kim LaClear**, **Josey McCloud**, **Erica Quealy**, and **Julie Schafer** from Customer Education; **Ed Helzerman**, **Robin Keene**, and **Julie Myszak** from Customer Service Center; **Cathleen Curran** from Employer Reporting; and **Jennifer Carter** and **Joan Schneider** from Process Support. The planning team was lead by **Fred Doll**, along with **Annie Earls**, **Josey McCloud**, and **Julie Schafer** from Customer Education.

View the [photo gallery](#) and the [PowerPoint presentation](#).

Because participation in the event was so high, ORS has been awarded an additional casual day, Thursday, February 5.

Way to go ORS!

business briefs

Detroit office schedule restructured

Beginning next week, February 2, the Detroit office will be open for walk-ins and appointments from 9:00 am to 4:00 pm the first and third Tuesdays of each month. The modified hours will allow Customer Education staff to focus their efforts on more effective and efficient ways to serve our customers in the Detroit metro area.

ORS Process Map

The [ORS Process Map](#) has been updated to reflect recent leadership changes in our organization.

Financial communications streamlined

Financial Services, Customer Education, and Employer Reporting are working together to update and automate a series of notices sent to reporting units that fall behind in contribution payments. Their goal is an automated process that will save time and be more efficient.



IRS posting

On January 30 ORS will file an application with the Internal Revenue Service to confirm that the plans we administer continue to meet the qualification requirements of Section 401 of the Internal Revenue Code of 1986. Internal Revenue Service rules require that all governmental entities refile their retirement plans by no later than January 31, 2009, if they wish to obtain updated determination letters confirming their tax-qualified status. For more information see the *What's New* section of each plan's website.

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

PURE MICHIGAN™

WAS testing

A dry run of the WAS (Websphere Application Server) upgrade was successfully completed last weekend in a test environment. Regression testing was performed during the week and the actual upgrade is expected to be deployed on Saturday, January 30.

After You Retire available online

The February 2009 version of [After You Retire \(R0614G\)](#) is now available on the state employees' member website. Printed copies will soon be available for members.

A few changes to note are:

- Clarification on dependent insurance eligibility.
- Notification of IRS pension limits.
- Explanation on how or when to use miAccount,



Contribution limits for 2009

The employee contribution limits for the 401(k) and 457 plans for 2009 are \$16,500 to each plan. The 2009 Catch-Up Contribution Limit (for those 50 years or older) is \$5,500 and the Three-Year Catch-Up provision for the 457 plan only is \$33,000. For more information, visit ING's website at <http://stateofmi.ingplans.com/>.

Social security earnings limits for 2009

- For social security recipients who are working and under the full retirement age (FRA), \$1 in benefits is deducted for each \$2 earned above the annual limit. For 2009, the annual limit is \$14,160 (up from \$13,560 in 2008).
- The limit changes in the year FRA is reached: \$1 in benefits will be deducted for each \$3 earned above \$37,680 (up from \$36,120 in 2008), but only counting earnings before the month FRA is reached.
- Beginning with the month FRA is reached, there is no earnings limit.
- [More information about social security limits.](#)

IRS limits

Section 401(a)(17) of the IRS code can affect the final average compensation, and therefore the pension payments, of certain highly compensated individuals who were hired after October 1, 1996. The rule places a limit on the maximum compensation allowed for retirement benefit computations. In 2009, the limit is \$245,000, up from \$230,000 in 2008.

ORS Excellence Awards nominations

Is there a person who routinely goes the extra mile to ensure 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 his or her efforts! Nominations can be in the following categories: Leadership, Innovation, Every-Day Hero, Living the Values, and Customer Service.



The deadline for nominations is 12 noon on Monday, March 2, and the nomination process is easier than ever before. Anyone wishing to write a nomination will be granted one hour during normal work hours to complete the form. You will need to

coordinate this time with your supervisor. [Get started on the nomination form now!](#)

Governor John B. Swainson Award nominations

The success of historic preservation often depends on the extra efforts of government employees. The John B. Swainson Award recognizes significant contributions to the preservation of Michigan's past (archaeology, archives, artifacts, stories, historic architecture and landscapes) by governmental employees in such areas as legislation, publicity, advocacy, and/or long-term fiscal support. The award can be for a specific accomplishment or for service over the long-term.



John B. Swainson,
Governor of
Michigan 1961-1963

Here are a few examples of the type of work that have garnered the award:

- A Department of Transportation employee who rearranged work on a construction project when a plank road was uncovered.
- A state police trooper who conducted oral histories, collected photographs and documents, and wrote a history of the Michigan State Police.
- A Department of Natural Resources recreation specialist who lead efforts to preserve and interpret historic properties on Lime Island.
- A cemetery sexton who preserved his community's history through writing, speaking, and the creation of a museum.

If you know of a governmental employee who has contributed to the preservation of Michigan's past, consider nominating him or her before the February 20 deadline.

[View the nomination form now.](#)

Michigan Travel Ideas

Make plans to discover Michigan's hidden gems. You'll find delightful, thrilling, and absolutely magnificent travel experiences in the *Michigan Travel Ideas* publication offered by [Michigan.org](#). It's a full-color, 120-page travel guide that will help you find the ideal spots to play and stay in Michigan. [Order your free copy today](#) and find out what "Pure Michigan" is all about.



A few facts about Michigan:

- More public golf courses than any other state.
- More downhill ski areas than any state except New York.
- More miles of freshwater coastline than any other state and the second-highest number of miles -- behind Alaska -- in total coastal shoreline.
- More than 11,000 inland lakes and 36,000 miles of rivers and streams.
- About 1,300 designated mountain bike and bicycle trails.
- About 75,000 acres of sand dunes.
- Eleven Great Lakes underwater preserves.
- The nation's largest dedicated state forest system, spanning 3.9 million acres.

SOURCE: Michigan Tourism Task Force report

PURE MICHIGANSM

**Jill Forebeck****Mary Jane Martinez****Johnny Moore**

CSC welcomed **Jill Forebeck**, **Mary Jane Martinez**, and **Johnny Moore** on January 26.

Before joining ORS, **Jill Forebeck** worked for Bank of America. She enjoys spending time with her kids and watching them play school sports. When she is not spending time with her kids, she assists with catechism at a local church and with the Junior Raiders program for the local middle school.

Mary Jane Martinez, also a former Treasury employee, enjoys traveling around Michigan with her daughter who participates in Mexican folk dancing. She also enjoys spending time with her son who is attending college in Arizona.

Johnny Moore enjoys watching and playing sports; he plays flag football and watches his son play basketball for Waverly. Before joining ORS, Johnny worked for the Department of Treasury.

**Kristina Braxton****Laura Williams**

Process Support welcomed **Kristina Braxton** on January 20, as a student. She is studying nursing at Davenport University, in her spare time she enjoys shopping, traveling, and visiting with friends. Before she joined ORS, Kristina worked for Michigan State Housing Development Authority.

Laura Williams began work on January 14 as a student in BPD. She is studying law at Michigan State University. In the past, she and her husband traveled to various countries around the world. She hopes they can continue traveling after she finishes college.

Staff on the move

On January 5, **Leza Rebera** joined CSC where she will be working on a number of process improvement initiatives.

DMB Mission:
Partners in achieving
excellence

Look how our tools have changed!

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

Thanks for reading!!



Those microfiche readers that staff recently cleared out of their office are now considered old-fashioned, bulky, and low-tech. However, at one time they were considered state-of-the-art. It causes one to wonder what we may consider old-fashioned and low-tech in the next 5, 10, or 20 years.

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.