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Calendar

<i>May</i>	
Memorial Day	27
State police board meeting	30

On the Horizon

- Tigers Game - June 5

Summer Synergy

Many customers retire during the summer and this makes for a very busy office. To help with the application push, a multi-process collaboration is finding ways to make this process as seamless as possible. One part of this plan is to send employers the instructions on how to report summer wages and how to provide termination dates. In addition, webinars and workshops will be conducted for employers to refresh or teach them how to report wages correctly. Some staff from Employer Reporting, Customer Education, and Customer Service will have cross training in the next couple of weeks to provide a deeper understanding of procedures as well as promote consistent internal language.



The goal for Employer Reporting is to make sure the reporting units post the retirees wages properly. Customer Service is focused on the retirees, their pensions and accurately reviewing the wage calculations for each application. Customer Education will communicate the rules and regulations to the employees and the reporting units. Consistency and working together will help many customers receive accurate information from ORS.

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Employee Appreciation recap

The week of May 5 was national Public Service Recognition Week, or Employee Appreciation Week as ORS celebrates it. As a way to thank you for working tirelessly for our customers, ORS provided a continental breakfast on Tuesday and ice cream sundae bar on Thursday. In addition, everyone should have received a pack of Extra gum, a symbol of the “extra” ordinary difference you make. Some pictures from the week are below.

- Central Perk cleaning
- June 10
- Father's day
- June 16
- Judges board meeting
- June 20
- State employees board meeting
- June 27
- Independence Day
- July 4

- Quick Links**
- [ORS Member Website](#)
 - [ORS Employer Website](#)

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
CS	Customer Service
DB	Defined Benefit
DC	Defined Contribution
DTMB	Department of Technology, Management and Budget
EPC	Executive Process Council (Phil, Laurie H, Anthony, Laurie M, Kerrie)
EPO	Executive Process Owner
ER	Employer Reporting
ORS	Office of Retirement Services
PRIM	Preretirement Information Meeting (public school employees)
PRO	Preretirement



Click [here](#) to see more pictures from Employee Appreciation week.

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Municipal Employees Retirement System, NASRA, and ORS joint meeting

On May 8, 2013, members of the ORS Business Leadership Assembly joined staff from the Municipal Employees Retirement System (MERS) for a roundtable discussion with Keith Brainard, Research Director at the National Association of State Retirement Administrators (NASRA). NASRA acts as a resource and an advocate for state-level retirement systems. Our membership allows us to access retirement-related research that NASRA conducts, as well as use the list-serve to communicate with other systems.

ORS director **Phil Stoddard** and MERS executive director Chris DeRose (who is also the former ORS director), shared opening remarks with the group, speaking to a new spirit of cooperation between our organizations. Mr. Brainard provided information about trends that NASRA is seeing in public sector retirement plans. The meeting then moved into a wide-ranging dialogue on a variety of subjects: funding system liabilities, compliance with accounting standards, federal and state legislative trends, defined contribution plan design, and how to communicate the value of a pension plan to stakeholders.

This conversation is part of our ongoing collaboration with MERS. By sharing information and ideas, we can tackle common problems. We can also help each other avoid reinventing the wheel, thereby saving time, effort and money. As an example, our plans are already working together on the implementation and communication of new financial reporting rules.

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ORS staff pilot Getting Things Done

	Orientation (<i>state employees</i>)
PS	Process Support
SME	Subject Matter Expert
UAT	User Acceptance Testing

Webinars

About 20 staff from several ORS processes attended two one-hour Getting Things Done time management webinars May 2 and 9. The webinars went over the Getting Things Done time management system created by David Allen.

The first training was an overview of the system, and the second training focused on using Microsoft Outlook as part of the system.

The system stresses being present, managing the different ways to-dos come your way (email, meetings, conversations, etc.), sorting them into buckets, knowing the next step to take on each task, and conducting a weekly review of everything on your plate to make sure it gets into the right bucket.

Fred Covert, who attended the trainings, had this to say: "...I find the central concept of always working on 'the next action' as incredibly valuable. I'm looking forward to continuing to grow into a GTD'er!"

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- **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**



Peer Network Provides Insights

Many of us participate in clubs or groups that share ideas and trade tips. Well, so does ORS and one group in particular, Cost Effective Measurement, CEM, provides a wealth of information and ideas that help us get better at what we do.

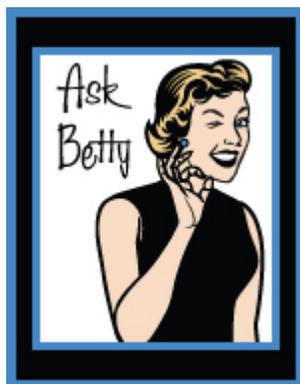
On May 6, **Laurie Hill** and **Laurie Mitchell** traveled to Columbus where they spent 3 days immersed in pension administration, policy, and trends. Besides coming home with some really great ideas we can use at ORS, they both benefitted from dedicating time to thinking about how we operate, how others operate and how we can best serve our customers.

"The conference is invigorating", says Laurie Hill. "There are so many good ideas, new information and ways to look at our business. Laurie and I will be meeting with some of the BLA members to see which ideas are the best for us and will be incorporating them into the business planning process."

CEM doesn't stop at being an important collaborative peer group. They also conduct significant research for the pension industry. They meet with, talk with, survey, nag and otherwise pester the more than 75 pension organizations who participate with them on everything from mail processing to online applications to investment practices. With this data, they provide comprehensive analyses that result in Best Practice determinations and in benchmarks to compare ourselves against. At this year's conference, they presented their research findings on the paperless pension process and on what it means to be a low cost system (ORS is low cost compared to our peers).

One of the highlights of the convention was hearing how the Teachers Retirement Systems of both Louisiana and New York served their customers after devastating hurricanes. Another highlight was hearing about the trends in demographic changes and how to engage our youngest customers in their retirement planning.

ORS is committed to ongoing training and development for all the staff and we have included a variety of training requirements on each person's Individual Performance Management metric. In the next few months, you will see several reports from conferences and updates on trainings that staff are attending. Watch for more





reports in future *LookOut* issues.

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Clarifying Working After Retirement Rules for members and employers

Legislative changes enacted with PA 300 (September 2012) and PA 464 (December 2012) changed the rules and reporting requirements for public school retirees who return to work in a Michigan public school. As a result, teams from across ORS have focused on clarifying the new rules and providing information and reporting instructions in ways that meet the needs of both our members and the employers.



For the Member:

- The [Working After You Retire](#) member webpage was reformatted for easier navigation. Members can now jump right to the information that relates to them.
- Updated copies of *After You Retire: What Every Pension Recipient Should Know* for public school retirees will be available early next month.
- Personalized letters were sent to 65 retirees who are reported as working in a Critical Shortage position notifying them of how many days they can work before they reach the 3-year limit.
- miAccount will show members how long they've worked in a Critical Shortage position and how much time they have remaining, so they can better monitor their 3-year limit.
- The Working After Retirement member tutorial is being updated to reflect the new rules and should be ready this summer.

For the Employers:

- The contribution rate charts were reformatted to separate out rates for active members from rates for retirees and former qualified participants (someone who has a Defined Contribution retirement plan and/or the Personal Healthcare Fund). ER also created separate rate charts for universities, community colleges, and K-12, since the rules apply differently to these reporting units.
- ER has provided reporting units with the technical requirements they will need to update their systems in order to report retirees when ORS's system changes go live in June.
- ER's presentation at the Michigan School Business Officials conference in April (highlighted in the last issue of the *LookOut*) focused on requirements for reporting retirees who return to work.
- Working After Retirement webinars are scheduled for employers next month. These will be followed with an employer tutorial that will be available 24/7 on the employer website.
- The Payroll Advisory Team met on May 16 and provided feedback on a new component of the Working After Retirement webinar, What to Report for Working Retirees. The webinar uses personas to show examples of how to report on retiree wages.

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Emerging Technologies Initiative

Do you have suggestions for software that you think will



benefit your daily work? Do you have specific issues with current technologies that you would like to see fixed? Now you can formally submit these suggestions and issues directly from the main [ORS SharePoint](#) page!

The Technology Assessment section in SharePoint offers links for suggesting new technologies to research and consider for possible adoption in the future. This page also allows staff to report technical issues with current technologies – not replacing the existing reporting methods just yet, but this is the first step in attempting to consolidate the technical issues communications to resources that can assist. The fillable form for reporting issues allows the user to provide a thorough description and detail of the issue to assist in the resolution process. The Technology Assessment page also offers surveys to staff which will gauge how useful we feel our current technologies are. The surveys will help identify gaps for analysis and action, areas for improvement within our existing technologies, and provide statistics on staff perceptions of performance of technologies through four core attributes; functionality, reliability, usability, and flexibility.

“That sounds great!” you say, “But how will it help ORS?”

Recognizing that front line staffers are aware of issues as they arise, **Nate Parrish** thinks “this new tool will open up and formalize frank discussions to take care of real issues and pain-points that we come across.” **Joe Brown** added that the tool can “increase awareness of new software and technologies that can make our daily tasks easier to manage.” Nate and Joe are heading this effort, with **Julie Andretz**, **Sean Douglass**, **Angie Sanborn**, **Andrew Silva**, and **Ben Southwell** representing the other processes and rounding out the team.

This tool has been active since April 5, but is now officially launched so you can begin using it immediately. Rumor has it that a casual day incentive is involved with the roll-out, so stay tuned!

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Customer Education Wraps Up 2013 PRIM season

CE conducted its last scheduled Pre-Retirement Information Meeting (PRIM) for the 2012-2013 season in Ann Arbor at Washtenaw ISD on Monday, May 13, 2013. It was one of the busiest seasons for the presentation team, having scheduled and conducted 32 regular and special request seminars. In addition, 112 Pension Reform seminars were presented with the assistance of other ORS staff and the EPC collectively providing information for over 13,500 public school members. Over the summer, staff will coordinate with employers to schedule seminars for the 2013 – 2014 PRIM season which usually begins in October.

DRO for Military Retirement System retirees now online

A new Domestic Relations Order (R0323D) for retirees in the Military Retirement System is now online. A Domestic Relations Order (DRO) is a specific type of court order that provides instructions for dividing a public pension as part of a divorce. This downloadable, fillable form allows retirees to create accurate and complete DROs that can be administered under the retirement statute.

Revised Retirement Readiness booklet for state employees now online

The May 2013 version of *Retirement Readiness: A Two-Year Countdown* for state employees is now available online. This version includes new information and

terminology from the 2011 Retirement Reform (PA 264 of 2011). Copies will be available in early June.

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comings + goings

Coming:

AST welcomed **Jason Ciluffo** and **Jack Simon** to the night crew as Night Batch Operators on April 15.



Jason Ciluffo recently moved to Portland with his wife and two daughters, ages 9 and 10. Jason has 12 years in the IT field in various capacities. When he's not at ORS, Jason enjoys spending free time with his family, playing tennis and soccer and occasionally tinkering with computers and gadgets at home.

Jack Simon grew up in Texas, but is from Lansing where he became an avid U of M sports fan. Jack also has over 12 years of IT experience, namely systems administration. He recently contracted with the US Army in Europe and Asia while stationed at Bagram Air Field in Afghanistan. In his spare time, Jack enjoys gaming and is a long-time World of Warcraft (WoW) player.



Amy Price joined the CE team as a Communications Rep. on May 13. Amy, a graduate of GVSU and Kendall College, recently worked for the Battle Creek Community Foundation and lives in Marshall with her husband. She likes finding new places in the wilderness to go hiking, biking, and camping around the state.



PS brought on student **Seirra McNamara** on April 29. Seirra lives in Fowler and is currently attending LCC, pursuing the nursing program and job-shadowing various nursing fields to help decide which direction she will take in the future. When not at school or ORS, Seirra enjoys the Michigan outdoors or spending time with her four siblings and two dogs.

On the Move:

Marla Milton accepted the analyst position in PS, which is effective May 26. Congratulations Marla!

ER's **Katie Little** will be joining CE as a student beginning May 20.

Congratulations Marla and Katie!

Goings:

AST bid farewell to **Sireesha Karasala** and **Deepika Rayapally** on May 3.

BPD gave best regard to **Craig Geiger**, his last day was May 7.

CE wishes the best to **LuAnn Kern**, whose last day is May 31.

CS sends their best to **Marie Leik**, who will be focusing on raising her family.

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Man on the Street



Our LookOut reporter hit the streets of ORS to ask this impromptu question: "What is your favorite comedy movie quote."



Nicole Bacigal

Bridesmaids

Annie: "What kind of a name is 'Stove' anyway?"

Flight Attendant Steve: "That's not a name. My name is Steve."

Annie: "Are you an appliance?"

Steve: "No, I am a man, and my name is Steve."

Annie: "You are a flight attendant."

Steve: "You are, absolutely accurate."



Joy Bartell

Addams Family Values

Gomez: "Children, why do you hate the baby?"

Pugsley: "We don't hate him. We just wanna play with him."

Wednesday: Especially his head."



Fred Covert

Blues Brothers

Elwood: "It's 106 miles to Chicago, we got a full tank of gas, half a pack of cigarettes, it's dark... and we're wearing sunglasses."

Jake: "Hit it."

Anchorman

Ron Burgundy: "I'm very important. I have many leather-bound books and my apartment smells of rich mahogany."

Cathleen Curran

Risky Business

Miles: "I don't believe this? I've got a trig midterm tomorrow, and I'm being chased by Guido the killer pimp."



Fred Doll
Up
Dug (the dog): "Squirrel!"



Dustin Duprest
Anchorman
Ron Burgundy to dog:
"Huh, you pooped in the refrigerator? And you ate the whole wheel of cheese? How'd you do that? Actually, I'm not even mad that's amazing."



Anthony Estell
Star Wars, The Empire Strikes Back
Yoda: "No. Try not. Do. Or do not. There is no try."



Danielle Fowler
Star Trek II, The Voyage Home
Dr. Gillian Taylor: "Don't tell me! You're from outer space."
Captain Kirk: "No, I'm from Iowa. I only work in outer space."



Jeanne Fox
Heathers
"Chaos is great! Chaos is what killed the dinosaurs, darling!"



Stormee Gallagher
Tommy Boy
Tommy: "I – I left a message."



Richard Hayden: "A message? What number did you call?"
 Tommy: "Two, four, niner, five, six, seven..."
 Richard Hayden: "I can't hear you, you're trailing off and did I catch a "niner" in there? Were you calling from a walkie-talkie?"
 Tommy: "No, it was cordless."



Randy Grundstrom
 National Lampoon's Christmas Vacation
 Clark: "Right you are, Edward!"



Mike Herbach
 Office Space
 Michael Bolton: "Why should I change my name? He's the one who sucks."

Spaceballs
 "You idiots! These are not them! You've captured their stunt doubles!"



Kay Johnston
 Kinky Boots
 Lola: [looks horrified] "Burgundy. Please, God, tell me I have not inspired something burgundy."



Josey McCloud
 Elf
 Santa to Buddy the Elf: "Well, there are some things you should know. First off, you see gum on the street, leave it there. It isn't free candy."



Marla Milton
 Coming to America
 Prince Akeem: "I have a date with Lisa! Isn't that great?"

Laurie Mitchell
 Princess Bride
 Inigo Montoya: "You keep using that word. I do not think it means what you think it means."



Bill Motz
 Animal House
 Bluto: "Seven years of college down the drain."



Angela Parkhurst
 Clueless
 Dionne: "Hello? That was a stop sign."
 Cher: "I totally paused."



Chad Seppala
 Stepbrothers
 Dale Doback: "Can we turn our beds into bunk beds?"
 Brennan Huff: "It will give us so much extra space in our room to do activities!"
 Dr. Robert Doback: "You're adults, you can do what you want."
 Dale Doback: "This is the funnest night ever!"



Heather Zaban
 Taxi Driver
 Travis Bickle: "You must be talkin' to somebody, so who are you talkin' to? You talkin' to me?"

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

Carrot awards are ORS' way to recognize staff for doing great work. Below are the carrot recipients since February 2013.



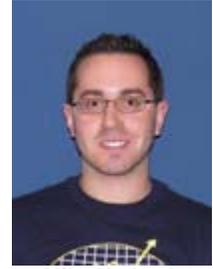
Mary Anderson



Ray Fleming



Danielle Fowler



Mike Herbach



Latoya Hill



Meg Leonard



Andrew Mkwaila



Kris Morris



Dan Norberg



Angie Parkhurst



Tim Simpson



Ben Southwell

a secure tomorrow.

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Thanks for reading!!



Amy Wheeler



Heather Zaban

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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.