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WDRA says farewell to friends

After tough budget-balancing cuts have been made, it is with heavy hearts that we say good-bye to a number of our close co-workers.

We wish the best to **Tawny Anderson, Tom Cole, Joan Dolby, Tanya Duncel, Laura Garza, Diane Kelley, Lauren Holton, Lyle Marquart, Lindsey McClellan, Dave Meiers, Diane Monroe, Pat Morely, Audrey Smith, Aaron Usher, and Bonnie Yatchak**, whose last day is today, Friday, April 27.



Diane Kelley waves goodbye.

These people have been with our office through evolving project times and provided quality service to numerous customers. They have brightened our days, shared our struggles, and helped shape our office to what it is today.

Thank you all for your dedication and service!

Calendar

April

Arbor Day 27

May

Public School Employees Board Meeting 3

Cinco de Mayo 5

Mother's Day 13

Office Cleanup 17

Judges Board Meeting 24

State Employees Board Meeting 24

Enhancements will help summer workflow

Often we experience an increase in public school retirement applications in the summer months. This year CSC is making process changes that, along with the introduction of a new workflow, will help get applicants on payroll sooner. Beginning in May, final salary affidavits (FSA) faxed to WDRA will be imaged immediately into Clarety. The FSA verifies the final salary of retirement applicants and is key to processing a public school employee retirement application.

After FSAs are imaged, staff will review the account to make sure everything necessary to process the application has been received. Once all FSAs are received (some applicants need multiple FSAs because they worked for multiple schools), a workflow will be initiated to send the application for closeout.

Raini Majeske says, "This is a huge deal because nearly 20 percent of applicants with July 1 retirement effective dates have multiple FSAs."

Previously this process was handled manually. Now, if a member calls to ask if we have received all of their FSAs, we can quickly identify which FSAs are missing.

Memorial Day 28

On the Horizon

- DMB Excellence Awards Deadline June 8
- Blood Drive June 20
- 9th Annual Tiger Baseball Outing June 26
- WDRA Staff Picnic August 16

Balanced Scorecard

[Click here to view the latest Balanced Scorecard.](#)



Quick Links

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

Commonly Used Acronyms

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
CED	Customer Education and Development
CSC	Customer Service Center
DIT	Department of

New CSC employees complete training

Since completing the five-week contact center training classes, **Rebecca Hoisington, Betty Jones, Robin Keene, Shannon Meyer, Amy Miller, Marsha Moore, Julie Myszak, Dena Orsborn, and Penny Winston** are now equipped to serve WDRA customers.

Each trainee attended formal classroom sessions and was tested on the information presented. Topics included an overview of the retirement systems, Siebel, Clarety, and telephone etiquette. SMEs shared valuable knowledge on insurance, service credit, eligibility, and pre-retirement to name a few. Trainees also observed contact center staff during customer calls.

“As a result of outstanding teamwork and communication among trainers and mentors and many hours of study by the trainees, the training proved to be a success,” **Linda Turner** said.

The training proved fun and interactive with “ORS Jeopardy,” which helped solidify each trainee’s understanding of the information in addition to quizzes and a final exam. Certificates of completion will be awarded to all current and previous trainees in recognition of their achievement.

Lois Musbach, Linda Turner, and Tom Zack led the training sessions with help from **Charla Drysdale, and Elaine Scott**. Thanks to the trainers and all of those who contributed to the training process, the “graduates” learned a great deal in a short amount of time.

Free training opportunities

Although DMB continues streamlining business, and the governor’s moratorium on training halted nearly all sessions offered by the Department of Civil Service, there are still ways to obtain required training. Alternative training options give staff opportunities to complete their Competency Based Training (CBT) requirements.

- Brush-up on computer skills by signing up for free Microsoft Office and GroupWise 6.5 classes taught by **Lori Edwards**. For a schedule of upcoming classes, log in to DMB’s intranet site at <http://connect.michigan.gov/dmb>, Employee Services, Training, Computer Training.
- The Department of Civil Service has an [online library](#) to checkout training materials from several categories including customer focus, human resources, information and analysis, leadership, quality, results, strategic planning, and training.
- [QuickKnowledge](#) is an online tool that offers free self-learning courses on presentation skills, basics of business writing, managing stress, and much more.
- The [Microsoft Office Live Meeting](#) web seminar archive gives access to various online seminars about customer service, leadership, and gaining many other skills. The sessions are about an hour long and require Real Player or Microsoft Media Player to view the content.

With many options available, find the training opportunities best fit for you. As always, please check with your supervisor in advance, then email employee training questions to DMB-Training@michigan.gov.

Spring 2007 All-Staff meeting

	Information Technology
DMB	Department of Management and Budget
EPC	Executive Process Council (<i>Phil, Laurie, Tim, Anthony, and Kathy</i>)
EPO	Executive Process Owner
ER	Employer Reporting
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
WDRA	Workforce Development and Retirement Administration

Complete with a referee shirt and jock-rock playing over the speakers, **Leza Rebera** pumped up the crowd to kick off the All-Star themed all-staff meeting.

Dore delivers winning speech

Chief Deputy Director Ed Dore used his former University of Michigan football experiences to deliver a motivating message to staff about success and team work. Despite the crowd's seemingly large Michigan State University fan base, the group encouraged Dore to continue.

By sharing his stories of Bo Schembechler, he illustrated the importance of giving, in order to achieve something. "It's all about how you play the game," he said. "You don't want to do things right once in a while, you want to do them right every time."

After commending staff for doing their best to be part of an all-star team, he finished up his coaching with a reminder that, "It's all about the team, the team, the team."

New DMB Mission and Vision

Mission: Partners in achieving excellence.
Vision: DMB will be the leader in providing high-quality cost-effective business services with a highly skilled and diverse workforce. We are problem solvers. We anticipate customer needs and partner to ensure the right business decision is made every time. We do our job so that our customers can focus on their core roles and responsibilities. Our goal is that customers will find working with us to be an easy, productive, and worthwhile experience.

Our department carries out the mission and vision statements while upholding its values of Integrity, Excellence, Inclusion, Teamwork, Growth, and Fun.



Above: Coach Ed Dore, DMB Deputy Director, talks to staff. [Click for more photos of the event.](#)

Welcome to new staff

On behalf of the entire office, Phil welcomed the staff new to WDRA in the last six months. Thank you to **Nagaraj Akula, Ginger Czubak, Jasmine Dawson, Michelle DeSouza Forte, Rebecca Hoisington, Kristine Jackson, Anitha Japa, Robin Keene, Lyndsay Keller, Aleah Lewis, Lindsey McClelland, Shannon Meyer, Amy Miller, Marsha Moore, Patricia Morley, Maudina Orsborn, Rani Selvaraj, Kyle Seymour, Nagapriya Subramani, and Kimberly Tomanszewski** for joining the WDRA team.

WDRA inches closer to web self-service

Phil announced that Systems Technology Group (STG), of Troy, Michigan, was selected and proposed to the State Administrative Board for approval as our web self-service vendor on April 17.

WDRA plans to work with STG to offer easy and convenient account access to our retired members from the comforts of their own home. Once the service is available to our retired members, staff will then focus on providing similar service to our active

members.

"We recognize that we are behind in technology in comparison to other service agencies like the post office and we need to catch up for the sake of our customers," said Phil.

WDRA Excellence Award winners announced

EPC handed out individual awards to deserving staff for the five excellence categories. Congratulations to **Sandy Ball**, **Sandy Blommer**, **Rose Meyer**, **Jon Seeger**, and **Clarissa Sheler**!

Leadership – Congratulations Sandy Ball! "Sandy reinforces the concepts of future visions and teamwork and provides staff with positive feedback and praise. She supports staff's decisions to take needed action and encourages them to find creative ways to address the tasks at hand. She has provided positive structure to BPD and demonstrates leadership through her actions. She does not ask more from her staff than she is prepared to do herself."



For nearly 10 years of dedicated service to our office, we thank you Sandy.

Every Day Hero – Congratulations Sandy Blommer! "Sandy is dependable, hard-working, and very knowledgeable. She approaches every new task diligently, taking the time to ask questions and if there are areas that can be improved, she takes the initiative to share her questions and ideas with others. With her upbeat and positive attitude, she makes every day a joy to come to work. She can be depended upon to listen and either share information needed to resolve a problem or brainstorm through it to get an answer. She is a team member who is well liked and regarded by her peers."



With a combined total of 10 years of dedicated service to our office, we thank you Sandy.

Living the Values – Congratulations Rose Meyer! "Rose has taken on many responsibilities in this organization including working on the strategic planning project. She has been the driving force behind this project and in spite of all the obstacles that have arisen in the process; she continues to be the one person responsible for keeping others involved, on task, and heading forward. She takes on additional responsibilities without concern for personal recognition. Her skills and dedication far exceed her position within this organization."



With nearly two years of dedicated service to our office, we thank you Rose.

Innovator – Congratulations Jon Seeger! "Jon is always looking outside the box to improve our way of doing business. He and his team have implemented a 2-minute call wrap-up time that significantly increased their capacity to respond to customer inquiries. He has integrated the two existing processes of Benefit Management and Customer Accounts into one. His efforts to streamline both areas have resulted in increased flexibility, knowledge, and cross-training to more effectively respond to seasonal demands and improve customer service."



For providing dedicated service with our office for five years, we thank you Jon.

Customer Service Award – Congratulations Clarissa Sheler! “Clarissa comes to work with a positive attitude and offers assistance whenever there’s an opportunity. She performs as promised by actively managing customer requests and meeting deadlines. She knows that her process affects the entire office and when a customer comes into the mailroom with a special request she gives it the highest priority. She exhibits respect for her coworkers’ ideas and encourages teamwork and accepts that everyone’s personalities are unique.”



With seven years of dedicated service with our office, we thank you Clarissa.

Congratulations again to the 2007 winners of the WDRA Employee Excellence Awards! The Selection Committee will further develop the nominations for this year’s winners and submit them for the DMB Excellence Awards that will be handed out this fall at the Employee Recognition Event.

You have until June 8 to submit a nomination for the DMB awards. Visit the [DMB intranet](#) for nomination samples and details.

EPC battled for top spot in All-Star Challenge

Leza invited **Zach Wight** to assist in coaching the EPC as they competed in basketball and football activities to win a casual day for a process. After each member drew a process name from a hat, they feverishly raced to take first place so their process(es) would win. Congratulations to **Laurie “Bunker” Hill** for winning the basketball challenge for CED, and to **Kathy “Doc Oc-Tober”** for winning the football challenge for the Director’s office and BPD.

And, with the powers vested in him, Phil announced that everyone in WDRA — the true All-Star’s — won a week-long casual dress prize!

Question & Answer Session

Once the crowd settled down from all the excitement, the EPC took the floor one last time to address questions submitted by staff. View the [questions and answers](#), if you’d like to recap.

Thank you’s

A special thank you to the All-Staff Planning Team (**Cindee Gates, Betty Jones, Lyndsay Keller, Pam Kenney, Kathy Parisian, Travis Peake, and Leza Rebera**) for putting together an All-Star meeting and to the CED staff for their technical and set-up assistance.



business briefs

Mass employer email functionality is now operational in Clarety

This allows ER, BPD, CSC, and CED to send email communications to school and state employers informing them of new and urgent matters related to retirement and retirement reporting. These matters include, but are not limited to, retirement reporting, member statements, employer contributions, employer newsletters, PRIMs, forms and publications, final salary affidavits, and reporting due dates.

New Retirement Readiness book for state employees

Retirement Readiness (R613G) has been updated to include IRS language in addition to content updates that keep our information up to date and consistent with

the website. Please use the existing copies of the 9/2005 version until stock is depleted.

Comings and Goings

CED welcomed **Jessica Cybulski** on April 23. Before joining WDRA, Jessica spent over a year working as a student assistant for the Department of Corrections and, most recently, the DMB Director's office. She is in the process of finishing her studies at Lansing Community College and will transfer to a university in the fall to finish her degree in advertising. She is also in the process of selling her first "flip" house which she bought when she was 20. She has six step-siblings and a dog named Taffy Jo.



Jessica Cybulski

Those working on the Vision Project wished the best to **Cynthia Hedden** whose last day with WDRA was Friday, April 13.

Setting an out of office rule

The [out of office instructions](#) show you how to set a rule to notify others when you are out of the office. It can be set to automatically run when a new mail is received during a specific time frame (you can turn the rule on days before you leave and will not have to turn the rule off). Additionally, conditions can be set that will eliminate auto-replies to ORS entities such as *ORS-Supplies*, *ORS-LookOut*, etc.



Go Green is a familiar chant around these parts, but try to make it a part of your daily mantra for a different reason, use it to remind you to recycle. April marks the celebration of both Earth Day and Arbor Day.

In recognition of both, the Chicago Tribune urged readers in the January 14, 2007, issue to recycle newspapers specifically. The Tribune reported that a single year's worth of a big city daily newspaper weighs almost half a ton, and for every ton recycled, 17 trees are spared and enough energy is saved to power an average home for six months! Also, 7,000 gallons of water are saved and our atmosphere is spared 60 pounds of pollution.

Let's all do our part to help save the world, one recyclable at a time.

Children visit the office

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.

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Customer Education and
Development

Thanks for reading!!

Several employees brought their children to work on April 26 to take part in Bring Your Child to Work Day. In addition to job-shadowing their parents, the children also met with Phil Stoddard to learn about some of the tasks we perform, how many customers we serve, and the large pension funds we protect.

Thanks to the assistance from DMB, many were able to take part in additional tours and activities.



Blast from the Past

LookOut article from July 2, 1999.

Have you thought about your own retirement?

What time is it when you work at your convenience, play often, enjoy a sunshiny morning, enjoy a leisurely trip, vacation in Hawaii, and the children are G2 (grown and gone)? It's retirement time! Transforming a retirement dream to a living reality takes some



planning, time, money, education and hard work. It's said that in the 21st century, planning for retirement will become more and more an

individual responsibility. A survey in *USA Today* revealed that adults spend an average of only 9.1 hours a year planning for their retirement compared with 145.6 hours annually selecting their wardrobe. Starting a proper retirement plan will provide a freedom of choices for you to enjoy during your golden years.

Individual retirement planning is a systematic process to prepare a person to continue

experiencing the same quality of life after leaving the workforce as was enjoyed during a lifetime in the workforce. How much money is going to be needed will vary by individual. Using a retirement calculator with known retirement income assumptions (including Social Security benefits, pensions, personal savings and perhaps part-time employment) will help you establish a time period for saving and investing for your retirement. The Ballpark Estimate, developed by the American Savings Education

See *Your Own Retirement* on page 4

Have you thought about your own retirement?

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Council, (Web site at www.asec.org) and LIFEPLAN by the National Council on Teacher Retirement, (Web site at www.nctr.org/lifeplan/start/start.htm) are just two of the many retirement calculators available and located on the Internet. A commonly assumed goal, according to State Street Global Advisors, is to have accumulated enough retirement resources (assets and income) to provide about 70% to 80% of your before-tax, pre-retirement income each year.



Studies have indicated three constraints (education, time and money) that may have a (un) favorable influence on many retirement plans. Procrastination is your biggest enemy, because time is a

significant factor in achieving your retirement dream to lead a comfortable life in retirement. Educating yourself to understand and manage these constraints not only enhances the success of your individual retirement plan, but develops in you a peace of mind in knowing that you can provide for your needs during retirement.

The three constraints each share a role with individual retirement planning. You may even

consider that each plays an interdependent role. For instance, assuming a hypothetical 7% tax-deferred return and personal fund goal of \$500,000 at age 65, a 25-year-old would have to set aside only \$190 each month, whereas a 55-year-old would have to save \$2,889 monthly according to Farm Bureau Insurance. The

moral is the more time you have until retirement, the less money you will need to save regularly (theoretically speaking to the power of time management). But, also, with this example, the 25-year-old understanding all three constraints will significantly increase the chance for success.

When it comes to retirement planning, the cliché, "it is never too late to start," should be coined, "never wait too late to start." So, if you are on course with your retirement investing plans then congratulations! If you have not started a retirement investment plan, shouldn't you make time today?

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.