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✉ On The Horizon

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It's a bird! It's a plane! It's the 2013 Fall All-Staff!

The emcee for this fall's All-Staff meeting, **Danielle Fowler**, welcomed the guests with cider, donuts, and fruit, and got the meeting started.

First off was a brief presentation on the ORS Strategic Intents, which guide our business at ORS. You'll see the Strategic Intents in the left sidebar of today's *LookOut*.

Next, State Budget Director John Nixon and Chief Deputy Director Phil Jeffery joined the meeting, and Mr. Nixon addressed the group. He spoke briefly about the federal government shutdown, and also complimented the ORS team for reducing unfunded liabilities by \$20 billion. In doing this, he said, ORS has shored up retirement benefits for the future while continuing to offer excellent service to customers. Mr. Nixon also presented a special Good Government Symbol of Excellence, or Director's Coin, to **Phil Stoddard** in recognition of his leadership at ORS.



"In DTMB, we already honor employees in a number of ways," Nixon said, "but these

board meeting
- December 12

- Public school employees board meeting
- December 19
- Christmas
- December 25

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, Laurie M, Kerrie, and Anthony)
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

coins are special symbols that recognize employees who go above and beyond and contribute to the state's reinvention," explained Mr. Nixon. It's the first Director's Coin that Mr. Nixon has presented to a Division Director.



There was a brief moment of excitement when a member of the audience foiled a [HYDRA](#) plot. Afterward, the audience took a moment to recover by watching the [Nest Egg Rap](#).

Next, Phil took the floor to start the Town Hall portion of the meeting. He noted that ORS makes a concentrated effort to hire the best, most talented folks who care about customers and take pride in a job well done. Not only is this effort reflected daily at ORS, it's also demonstrated by teams like the Green Team, EMPAC, the Garden Club, SECC, and Get Fit. He explained that the Director's Coin from Mr. Nixon actually represents the passion, innovation, and dedication of the ORS staff.

Phil then addressed the questions submitted before the meeting. You can view the questions and answers [here](#).



The meeting ended with BPLs from each process introducing the new members of the staff, and a big thank you to the All-Staff planning team: **Linda Beachnau, Danielle Fowler, Latoya Hill, Mark Howard, Peg McLeod, Josey McCloud, Patricia Myles, and Don Williams**. Also, thanks to those who graciously provided

UAT User Acceptance
Testing

help, including Fred Brock, **Sara Hoppes**, and the CE team.

ORS Strategic Intents



- Forge Operational Excellence
- Instill Customer Confidence
- Engage Hearts and Minds



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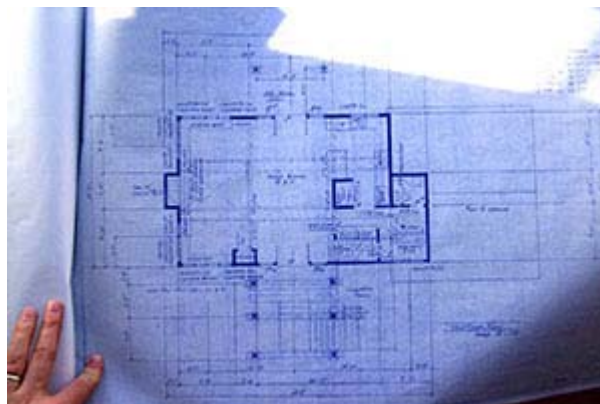
Business process highlights: Process Support

Each process at ORS has several items on the business plan that they'll be working on in Fiscal Year 2014. We'll talk about one or two at a time so you can see what your ORS colleagues are working on and put together the pieces of the business plan puzzle. First up is Process Support.

Review and update ORS retention schedules.

The State of Michigan has policies, called retention schedules, that dictate how long to save all records created by state employees. From emails to letters to mailings to recorded phone calls, each retention schedule tells us how long we must keep something, or if it should be kept at all. Depending on the type of record, it could be disposed of immediately after you review it, be kept for less than 30 days, or longer than 500 years, and anything in between. Without retention schedules, we would be obligated to keep all State of Michigan records forever!

As part of an overall DTMB initiative, PS is reviewing and updating the ORS agency specific schedules to make sure that they are accurate for the types of records we create and the work we do. You can find links to the current retention schedules on the [PS KL page](#), under the Records tab.



Document the ORS staff lifecycle processes.

A lifecycle process is another way to describe a staff member's entire experience at ORS: from recruitment to orientation and training, skills assessment, and even exit interviews.

This business plan item is broken up into two parts. The first part for FY 14 is to create and review process maps for everything we currently do, and identify any gaps in process or materials. Then, they'll document what they'll need to do to fill the gaps. The second part for FY 15 is to fill the gaps using existing tools and processes, and creating new ones where needed.

This business plan item ties into two Strategic Intent: **Forge Operational Excellence**, and **Engage Hearts and Minds**. The lifecycle project will improve staff orientation so new ORS employees will hit the ground running, and will ensure that staff have access to the training they need to excel at their jobs. It will also empower staff and give them opportunities for leadership and personal growth.

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Ain't no party like a pizza party

On October 9, we celebrated our 90 percent response rate on the Engagement Surveys with a pizza party. We also received two casual days for the outstanding rate of participation!

"We make our voices heard, *and* we get pizza and casual days! What a great bargain," said **Kayla Lintz** of ER.

Stay tuned to the *LookOut* for the results of the ORS Engagement Survey.



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The website for MIP and Basic public school employees has been updated to include changes from the recent reform. It now includes more complete benefit structure information including MIP 7%, MIP DC Converted, Basic 4%, and Basic DC Converted. Other new features include separate MIP and Basic at-a-glance charts, updated pension formulas, a new landing page, more robust Personal Healthcare Fund information, and revised service credit purchasing requirements. Check out the site [here](#).

Connections published on web

The October 2013 issue of ORS's retiree newsletter, *Connections*, is now live on the website. Pension recipients will receive the newsletter with their October direct deposit statements.

Boo Day on October 30

ORS's Halloween tradition, Boo Day, is happening October 30! Make sure to email [Diane Monroe](#) with the location of your process or team's Boo Station. There will also be a contest for best Halloween Costume, so get creative! Details on Boo Day (including bringing your little ones for a bit of trick-or-treating) can be found [here](#).

National Save for Retirement Week October 21 - 25

ORS will be sharing a special week of social media content to celebrate National Save for Retirement Week, October 21 – 25. The week's activities are focused on increasing online interaction with our younger audience and those with a DC component to their retirement. The week will culminate in a special "Ask Phil" Facebook chat on Friday, October 25 at noon. Phil will be working with CE staff and subject matter experts to answer questions that our Facebook fans will be asking in that hour. This Facebook chat is a new activity for ORS, and there's no guessing what the turnout will be. Stay tuned!

Electronic Photoboard available on PS KL page

Process Support has created an electronic version of the Photoboard in Crossroads. You can access the SharePoint Photoboard on the [PS KL page](#).

Get Fit sponsors ORS Pinkfest

On October 10 the Get Fit Team sponsored the first PinkFest at ORS which included a best pink outfit contest and serving all pink foods. \$292.50 was raised to donate to the Susan G. Komen Foundation for breast cancer research. Check out pictures from the event [here](#).

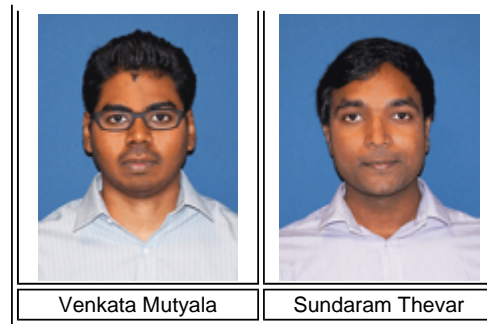
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Coming

On October 7 AST welcomed two new staff, **Venkata Mutyala** and **Sundaram Thevar**.

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Venkata is from India, where his family still lives. Venkata earned an Engineering degree from Acharya Nagarjuna University. Venkata likes playing soccer and badminton and also enjoys cooking when he's not at ORS.

Sundaram is from Mumbai, where he earned an Engineering degree from Mumbai University. Sundaram has a keen interest in finance and economics, having IT experience with Bank of America and several financial and healthcare applications. Outside of work, he enjoys travelling, listening to music, painting and writing.



AST welcomed **Chelsea Wagner** to the team as a student assistant on September 30. Chelsea, from Mason, has been with DTMB for the past 3 years while also attending Western Michigan University, pursuing a degree in Occupational Therapy. She enjoys time spent with Bella, her lab/pit bull mix, playing soccer, and working at a Children's Respite Home on the weekends.

On the Move

Andrew O'Keefe completed his assignment in ER on October 4 and returned to CS. Welcome back, Andrew!

Bobby Hoppes and **Dustin Duprest** began assignments as WOC analysts in ER on October 7. Congrats guys!

Going

AST bid farewell to **Tejaswini Chirumamilla**. Tejaswini's last day was October 2.

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Merging Excel workbooks

There may be instances where you need to combine the contents of a set of similar workbooks into a single workbook. That process can be tedious if you have to do that manually. Did you know that Excel allows you to merge multiple copies of a workbook with different names into a single copy?

To display the Compare and Merge Workbooks options on the Quick Access Toolbar

1. Open any one of the copies of a shared workbook.
2. On the File Tab, select Options.

3. In the Excel Options dialog box, click the Customize Ribbon category, and from the Choose Commands From drop-down list, select All Commands.
4. In the All Commands list box, select Compare and Merge Workbooks and click Add.
5. Click OK to close the dialog box and to add the Compare and Merge Workbooks button to the Quick Access Toolbar.







To merge workbooks

1. Save different copies of the shared workbook in a folder along with the main copy.
2. Open the workbook with which you would like to merge other workbooks.
3. On the Quick Access Toolbar, click the Compare and Merge Workbooks button.
4. In the Select Files to Merge into Current Workbook dialog box, navigate to your folder and select the files you would like to merge with the open workbook and click OK to merge the workbooks.

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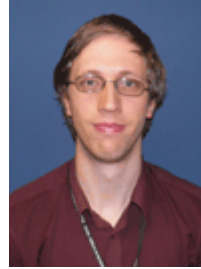
Kudos

	Kudos to Dan Norberg ! "Dan, you were very helpful to me as I prepared for a meeting with another agency. You were able to provide me to great options and offered your assistance with staff training in the future regarding my security question. Thank you very much!"
	Thank you to Katie Little . Katie is doing a really good job with all the different the communications ER has going on! Thanks Katie for all your work!
	The staff at the ORS web reporting center are FANTASTIC! They are super stars!
	A reporting unit had great things to say about ER . "They are professional, guard privacy of members to the extreme (so important), and really know what they are talking about. In addition, our Payroll Specialist receives excellent service from ORS regarding ANY payroll questions or issues. With all the changes -- ORS staff always maintains a calm and reassuring attitude. You are the BEST!"

	<p>The ORS staff is always patient, helpful to work through any mess created. I greatly appreciate the people who answer the employer web reporting hotline! Thank you!</p>
	<p>A customer commended ORS staff, "With the massive changes to the retirement system, the staff at ORS has been remarkable in helping to understand these changes. They also have provided information on where to find documentation on various topics."</p>
<p>A member raved that Jeff Soergel has been WONDERFUL at looking at their entire picture and verifying their information.</p>	
	<p>Thank you Deb Lawrence! A reporting unit said, "I always hope that I get Deb Lawrence when I call for some help because no matter how stupid my question is or no matter how big or small my problem is she always helps me and treats me with respect and never makes me feel stupid and she is very knowledgeable and always helps me through my confusion and that is a huge help."</p>
	<p>Great job Annette Ruiz! A customer said, "I have a great relationship with Annette and she has been very patient and helpful to our payroll department in all aspects."</p>
<p>A big thank you to Drew Gilliland and Kayla Lyntz. "Drew and Kayla always make time to help me out; even when we have to go back and forth until it everything works. Their help is so valuable to ensure the quality of the <i>LookOut</i>."</p> <div data-bbox="755 1308 1177 1575">   </div>	
<p>Kudos to Fred Doll and Danielle Fowler. ORS received this comment from Keith Brainard, NASRA Research Director: "...please let Phil Stoddard know that the MI ORS roll call response is outstanding. We really appreciate all the time and effort the staff took to prepare and submit such a robust response." I'm not surprised that we not only hit the mark but set a very high standard. Thank you!</p>	

	
	<p>Thank you Mary Staley! "On behalf of the Northern Michigan School Business Officials, I would like to express a sincere thank you for taking the time out of your busy schedule to come and speak to our group. Our group tries to bring in quality speakers, such as yourself, in order to provide solid professional development for our members."</p>
	<p>Kudos to Amy Wheeler for being thorough and diligent with testing. She went above and beyond, and was willing to learn new things to make sure everything got taken care of timely. Thanks Amy!</p>
	<p>Thank you to Autumn Hubbard She was very helpful and saved us a lot of time. Her work has helped us identify around \$250,000 in questionable costs.</p>
	<p>Kudos to Joe Brown. "When I deleted a couple key files by accident, Joe not only helped me restore them, he showed me how I could do it myself if it ever happened again in the future. The tip has already come in handy for others I've shared it with. He's a lifesaver."</p>
	<p>Great job Laura Hall! A member called to say that she spoke with Laura who was the only one who stepped in, kept reviewing her account, followed up on a regular basis and got done what needed to be done. She couldn't use enough positive adjectives to describe Laura (fabulous and magnificent among them) and the last one was "Laura was my angel and new best friend".</p>
<p>The DTMB SMT visit resulted in everyone putting in a little extra time to tidy and clean. However, Seirra McNamara and Don Williams really went the extra mile. They hustled around the 3rd floor in both wings, the core and even first floor lobby and elevator lobby, looking for anything that could be cleaned, wiped, removed, or replaced. They recognized the importance of the management meeting we are</p>	

hosting in the GOB and took it upon themselves to help make it a memorable visit for our guests. I appreciate their hard work and attention to detail.



Kudos to **Nicole Dumond** and **Kara Gross**, for their time and effort working with me on a recent project. I needed their brains to ensure that the updates I was making were accurate, customer-friendly, and also worked well for ORS staff needs. They spent several hours with me to make sure we got it right, and answered any questions I had.



Thank you to **Angela Sanborn** for her preparation and assistance in sharing CS's vision with AST on why the workflow management tool is needed and how it will be used so that we can move forward towards implementation of the plan.

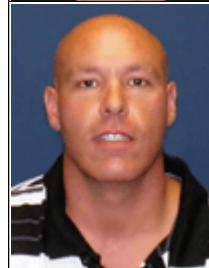
A member would like to thank **Andrea McDonnell** for the great customer service. "She was very patient, and helpful. She answered all my retirement questions and helped get on to miAccount so I could apply for retirement. Thank you again for your great customer service."



Thank you to **Tim Droste** for coming in on his flex day to test MIP Interest.

Thank you to **Ted Walker** and **Marissa Palacio** for contacting the members with outstanding documents that we needed in order to complete their retirement application.

Kudos to **Latoya Hill** for completing all insurance tickets within 24 hours for the last couple months. Job well done!!



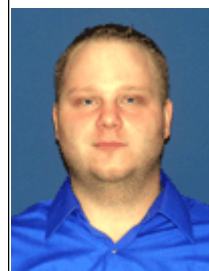
Thank you to **Rudy Litterini** for helping a member fill out her retirement application in the Walk-In office. The member and her family were very thankful!

Thank you to **Amanda Coulter, Crystal Tucker** and **Carla Rhoads** for doing the outbound emails to members that have not made a selection for the reform. Because of their efforts, we have had responses from the members.



A member gives thanks to ORS, "I received my first pension check. I am writing to express my sincere appreciation to all of the people that worked within the Office of Retirement Services system to make my transition into retirement a reality."

The part time staff would like to thank **Linda Johnston** and **Johnny Moore** for being so pleasant and providing them with knowledgeable information any time they contact the HUB. Thank you Linda and Johnny for all you do!



Katrina recognized **Steven Scavarda** for assisting with the After Call Survey Report and for covering her while she was on vacation.

Kudos to **Steven Scavarda, Rachel Augst** and **Gabrielle Whitfield** for their quick turnaround on the SERS hire date project.



Thank you to **Shannon Prawdzik** and **Mary Anderson** for providing examples on the types of calls we were receiving within 2 hours of the request!



Marissa Palacio came to me with an account that had been suspended for a missing birth certificate. Rather than just noting the account, she drilled in further and discovered the account was processed with the wrong retirement effective date. After making the correct adjustments, the soon-to-be happy member will be receiving a retro payment due to Marissa's diligence. Awesome work!



Andrew O'Keefe is already missed by CS after less than one week in ER. However, his contribution in ER are already having positive impacts as he's taken ownership of the Years of Service message board bucket, is actively working on Policy and Procedures, and is actively sharing the CS process perspective with the ER team.



Sherea Lacy is appreciated for dusting off the "Get Fit" project and taking the initiative to launch the team. This idea had nearly been shelved and forgotten until Sherea revitalized efforts to get it going.



Mike Sysak has been doing a great job putting together information for VOC. He has been putting together and schedule/calendar, coordinating training with Elaine and Katrina. Just doing a great job.

Kudos to **Daryl Brock**! When the member was trying to reach another agent, Daryl advised the member that the agent was not available at the moment; gave the member the option of going into his voice mail instead of just transferring her. Some would have taken her attitude and just transferred her, which would have

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

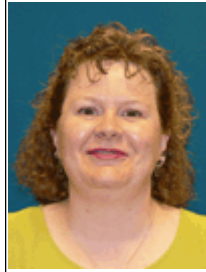
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Thanks for reading!!



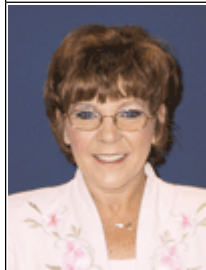
just made her more angry. You made the right choice - putting member first. This shows first class customer service. No matter what the customer is going through or what their attitude....we are taking care of them and their needs – not just dumping them. Wonderful job Daryl!



A big THANK YOU to **Lisa Schmidt** for helping test the Zip Tone.



Thank you **Tim Droste** for attending the DC to Clarety and SERS overtime Requirement sessions!



I wanted to let you know how helpful **Sandy Blommer** was for the exception report as well as other "junk" that I come across and need help with. From the exception report to everyday audits, she is always willing to help me with anything I throw her way - she is awesome!

The CE analysts and BPO would like to give thank **Steve Cary, Angie DeRose, and Nicole Dumond** for being a valuable participant in the requirements meetings. They provided good insights that will benefit the business.



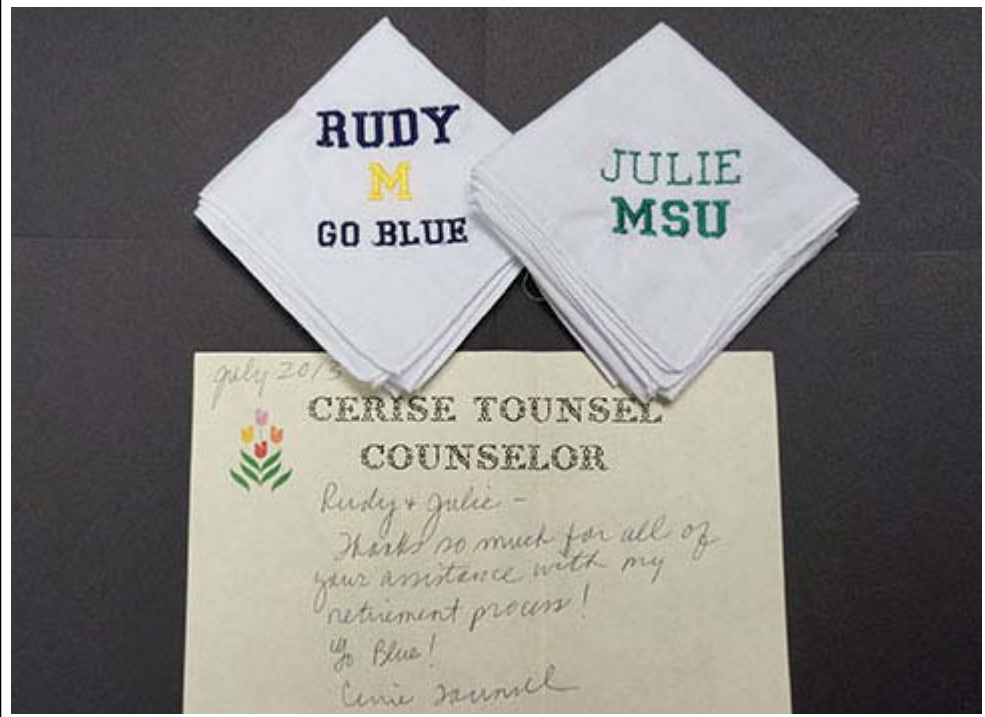
A recent retiree wanted ORS to know that **Julie Wight** went out of her way to make sure that her retirement application went through and that her and her spouse were put on insurance. The member had forms missing and documentation that needed to be turned in that were not. Julie followed up with the member to ensure it was taken care of. The member's exact words were "Julie is helpful, kind, considerate and just a wonderful human being. I have dealt



with other at ORS and Julie stood out as outstanding!"



I want to give a huge kudos to **Brenda Prast**. Her lunch was interrupted to come down to the walk-in office to assist a customer and his new spouse with an EDRO. She did this without hesitation and it was her first trip EVER to the walk-in office. She provided clear concise information on a complicated subject matter and they were able to understand. Thank you Brenda for going above and beyond to assist me it was greatly appreciated.



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This issue's header is s Fall Evening: North Bar by Carolyn Damstra.

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.