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Webinars a hit

As of June 19 we have held 16 webinars (216 attendees) for school employers on completing the final salary affidavit. The survey results have been overwhelmingly positive, with comments like "This is a fantastic way to convey information. I can remain in my building and at the same time receive very valuable information."

Because 99 percent of participants indicated an increased understanding of how to complete a Final Salary Affidavit, and 97.9 percent indicated they were comfortable using this method of training, CED is developing plans to expand the offerings to employers and members. (See *Reception area triage formed.*)



Customer comments from a recent survey

- This was my first webinar, but it will not be the last!
- This was so convenient and easy.
- I like it a lot; I'm able to learn from work and not hassle with any travel.
- Wish this method of training was available when we first went online with ORS.

Calendar

July	
Independence Day	4
State Police Board Meeting	19
Public School Employee Board Meeting	26
August	
State Employee Board Meeting	9
WDRA Staff Picnic	16
Annual Golf Outing	29

Retirement in the news

Staff have been busy pulling data to fulfill an unusually large amount of FOIA requests. BPD's **Leza Rebera** reported that she was busy pulling data, running queries, and reporting to DMB leadership on a variety of retiree and member analysis issues from January through May.

With *The Detroit News* requesting information ranging from the average age of our retirees by year to health care costs by age, staff have been working hard to ensure the most current and factual data was pulled from Clarety and the Comprehensive Annual Financial Reports.

"We were able to pull some of the data from Clarety," said Leza. "But several requests required complex queries that took time to prepare, run, review and report."

In addition to running queries, BPD staff had to review communications between Chris DeRose and the public school board that took place between 2005 and 2006 – a daunting and time consuming task, to say the least.

On the Horizon

- All Staff Meeting
October 16

Quick Links

- [ORS Member Website](#)
- [ORS Employer Website](#)
- [Policies and Procedures](#)

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
DB	Defined Benefits
DC	Defined Contributions
DIT	Department of 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

“**Andy Oser’s** ability to not only review the actual ‘technical’ request for data, but infer the business impact of those requests was a great help,” commented Leza. “He understands the data and asks the right questions to ensure all angles are covered.”

FOIA and other media requests are all funneled through DMB Communications Director, Edward Woods III. For requests about our retirement system, Leza and BPD, AST, and CSC staff worked diligently to make sure that records were pulled, charts were created, **Phil Stoddard** had the information needed, and that DMB leadership was well apprised of retirement system standings.

Hats off to our crew for their valiant efforts to meet the requests from our public!



McCormick reappointed by Governor

Governor Granholm reappointed **Tim McCormick** to the Correctional Officers' Training Council. The council was created to establish certification and standards regarding training and education of correctional officers. Tim has served since November of 2003 and will be representing DMB for a term expiring March 29, 2009.

Notable notary note

One in four retirement applications are returned because the date signed by the applicant does not match the date signed by the notary public. Forms requiring signatures witnessed by a notary public, such as the public schools' *Election of Pension Option (R010C)* form, must be signed and dated in the presence of a notary public in order for the application to be processed.

Notaries public in our office: **Joy Bartell, Rebecca Hoisington, Raini Majeske, Cindy Mooney, Kathy Parisian, and Chuck Simpson.**

DMB reengineering outreach a success

Our very own reengineering team (consisting of **Andy Kolp** and **Peggy Shinn** with assistance from **Kerrie Vanden Bosch**) recently finished assisting DMB's Building Operations staff with their predictive maintenance process, identifying opportunities to save approximately 1.7 full-time equivalents. The team is now working with Financial Services Operations to reengineer the way risk management billings are processed. Beginning June 18, the team will begin reengineering the project closeout process for Design and Construction staff.

Act 88 website revisions

Act 88 language on the Judges DB website has a new look and added content. The page includes an easy to read checklist for conditions and eligibility. In addition we have removed language regarding contributions on deposit as it was no longer required for Judges.

State and public school employees will see an added paragraph that explains refunds of contributions and how that plays into ACT 88 service credit.

EMPAC photo contest winners

SME	Subject Matter Expert
T&T	Tools and Technology
WDRA	Workforce Development and Retirement Administration



TDP reports streamlined

Thanks to suggestions from the Payroll Advisory Team (PAT), ER is running a 30-day pilot process for electronically submitting Tax Deferred Payment (TDP) data. The team hopes to have this process made available to all employers by mid-August.

In the past, school employers had to mail a text file of the TDP agreement and addendum on a diskette to our office. PAT is working toward a long-term goal that would allow loading the TDP agreements via the employer reporting website.

These shoes are made for walkin'

Encouraging Walkabout members to keep active during their six-week challenge, the Health and Safety Specialty Team hosted a walking event for members to get good use of out their new pedometers and cool off with ice-cold bottles of water.

Another bottled water day is scheduled for Tuesday, June 26 during break and lunch times at 10:00-10:15, 12:00-1:00, and 3:00-3:15.

At a Walkabout brown-bag lunch **Michelle Thompson** commented: "Since I started walking in November I'm up to almost 5 miles a day and I've lost 50 pounds without changing my diet. Even my doctor has told me I've inspired him and his wife to get walking!"



Reception area triage formed



When someone uses the word triage, we tend to think of hospitals or maybe the old TV show



Joy Bartell finishes up after a busy afternoon in the reception area.

M*A*S*H, but it's defined as any system used to allocate a scarce commodity to those deriving the greatest benefit from it.

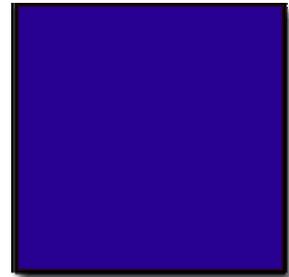
As we move toward the last week of June and walk-in business picks up for the June 30 service credit billing deadlines and the July 1 retirement effective date deadlines, CED has been working on a triage process for walk-in customers.

Triage will be effective if a specific group of people have a specific set of questions that can reduce the number of people who need to see that "scarce commodity:" a counselor!

As it turns out, there are a fair number of folks who simply want help in the following:

- Filling out a retirement application.
- Turning in completed application materials.
- Simply paying for a service credit billing and getting a receipt.

To begin the triage process, CED created a short recorded presentation for our public school customers, using the webinar format, but only providing it a recorded version. It's a 17-minute presentation titled *Completing the Retirement Application*, and is now available by [clicking the webinars and seminars link on the public school website](#).



Next, CED is working with PS to set up Conference Room W with desks and chairs and a computer that will allow our customers to complete their applications while watching the instructional webinar.

Conference Room W will also be used for customers to sit with a mailroom staff person to fill out their checks and receipts.



Lyndsay Keller reviews applications after completing recent training.

Finally, the reception staff (**Zach Wight**, **Lyndsay Keller**, and **Jessica Cybulski**) have been trained to review and date-stamp the retirement application as complete without a counselor review. This will prevent many customers from having to wait for a counselor. And it will also free the counselors to serve those "deriving the greatest benefit" from a counselor meeting.

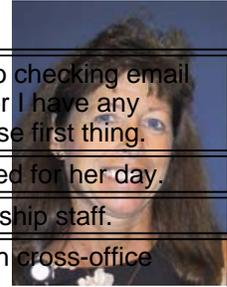
CED will review the process after the busy season is complete to determine if there are other opportunities to build on and whether changes need to be made.

A day in the life of Rose Meyer

As project liaison between many people and large projects within DMB, Rose is a very busy woman. Her core function is to provide support to Laurie Hill, yet the daily demands of this office tend to pull her in many additional directions.

Check out the day planner below to get the inside scoop on a

typical day for Rose.



7:00	Start my day out with coffee, and then dive right in to checking email and calendar items for myself and Laurie. If Laurie or I have any materials needed for meetings that day, I gather those first thing.
7:15	Meet with Laurie to make sure she has what's needed for her day.
7:30	Schedule meetings and prepare materials for leadership staff.
8:00	Communicate with DMB executive staff to assist with cross-office business.
8:30	Pull up Clarety to assist with death processing backlog.
10:30	Clean up dependent files by verifying social security numbers and other Clarety data on file. When errors are found I clean up the ones that I have access to and submit a PIR (Problem Incident Report) for those that I don't have access to.
12:00	When I get time I grab my lunch and take a quick break here in the office.
12:30	Wrap up items on my Strategic Planning to-do list. For each phase of strategic planning I have taken turns managing the work groups and I make sure they have what they need to continue forward and meet their objectives.
2:30	Prepare Board materials by requesting agenda items. For each meeting I also pull payroll information, attend the meetings, take minutes, and prepare answers for questions that come up and are unanswered during the meeting. I'm really looking forward to having Board materials posted online soon. Once we have the online process available it will save time preparing and sending materials and it will be a great cost saving.
4:00	Time to head home for the day.

Rose's day doesn't end here. She is in the process of obtaining her bachelor's degree in business administration from Northwood University. She takes classes online and has also done work at the Northwood campus located at Lansing Community College.

In addition to the tasks listed above, Rose serves as a liaison between retirement and other DMB offices. She is very modest about the work she does and pointed out, "**Terry Rideout, Kathy Ciaramella, and I really work as a team.**"

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

Comings & Goings

Mary Crispin has come back to assist CSC in the insurance section until approximately August. Welcome back, Mary.

Blast from the past

Check out the staff in this article from the March 10, 2000 issue of the *LookOut*.

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Thanks for reading!!



*Sometimes it helps to view things from a different perspective. Mary Burmis recently led CIC staff through some "Creativity Training" that SouthWest Airlines used on some of their delayed flights. Staff designed their own "glasses" so they could "see things through different eyes" – an exercise ITR also enjoyed last fall. The laughter it generated helped relieve some of the built-up tension from answering phones. Those participating are, from the left: (standing) **Kathryn Stehle, Don Dimitroff, Joyce Weber, Mike Novak, Mary Burmis, Fred Doll, Judy McLean, Bill Motz, Patsy Burhans, and Cheryl Moore;** (sitting) **Gordy Hicks, Sue DeBor, Pam Kenney, and Tony Contu.***

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.