



Look Out

April 7, 2000

Volume 3, Issue 18

ORS Mission:

We deliver pensions related benefits and services to promote the future financial security of our customers.

ORS Vision:

Fast, easy access to complete and accurate information and exceptional service.

ORS Calendar

April

Six Weeks to Wellness

kickoff ----- 17th

Easter ----- 23rd

Pension Paydate ----- 24th

Spring Cleaning/Silly

Clothing Day ----- 28th

May

Public School Employees

Board Meeting ----- 11th

Judges Board Meeting

----- 18th

Pension Paydate ----- 24th

State Employees Board

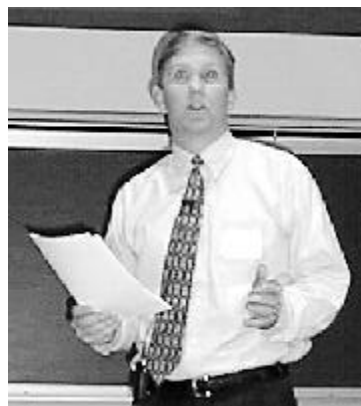
Meeting ----- 25th

Memorial Day ----- 29th

All-Staff Meeting explores the future

The ORS All-Staff Meeting on Thursday, March 30 had a new flavor to it! **Dan**

Lohrmann, Director of Information Technology Services Division (ITSD), shared the podium with ORS Director **Chris DeRose** to explain how ORS will make the transition to a process-based organization. The audience had new faces as well, with ITSD staff in attendance. And this meeting had a much more interactive element as staff moved from room to room in the ORS Process Fair to learn how the process will fit together.



ITSD Director Dan Lohrmann

Dan took the floor to expand on the reasons that led to the New Foundation.

He noted that in the past roles between ITSD and ORS have been unclear. There was a lack of ownership for decisions and projects throughout both organizations. This is dangerous because without clear ownership, balls get dropped, or decisions are delayed or not made at all.

Chris kicked off the meeting by noting that the ORS Mission explains why ORS exists—it's a picture of where we are today. The Vision, he continued, tells where we are going. He then explained the New Foundation, a partnership between ORS and ITSD.

"Technology is driving what the business can do," Dan said. "Technology alone won't fix everything. Business processes need to be defined. The goal is to view the organization by processes, not people."

"Both ORS and ITSD must understand

See All-Staff Meeting on Page 2

DMB's Balanced Scorecard moves toward implementation

The Department of Management and Budget's Balanced Scorecard (BSC) is a management tool that provides a comprehensive measure of how the organization is progressing towards achieving its strategic goals. The BSC is a collection of measures that reflect a single strategic direction versus multiple independent objectives. It combines state of the art management

practices with state of the art measurement practices. It balances financial and non-financial measures and performance drivers with outcomes.

The purpose of DMB's BSC is to measure progress on the strategic

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All-Staff Meeting

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what their roles are, what they are supposed to do, and what they are accountable for. How we are going to operate together must be defined. We must have a common vision for the project. The requirements of the business will determine what technology will do. Not the limitations of technology setting what the business can and can't do.



ORS Director Chris DeRose picks a winner from the box held by Joanne Busley.

"These things are 'foundational.' Our project is like remodeling a house. We have a house that we want to remodel (ORS). The foundation appears to be cracked. We as a leadership team recognize that our foundation needs to be repaired as the first step in VISION ORS. By fixing how we operate together, who we are, what is expected, how we operate today—then we are going to be successful. This first step is critical. And we recognize it.

"A cross-functional team of individuals from ORS, ITR, and ITSD—a New Foundation Team (NFT)—spent 120 days together and made five key recommendations on what needs to be done:

1. A need to focus on what our

processes are and how we perform them.

2. Everyone must know what their role is and what they're accountable for.
3. We need to align our organizational processes with the technology supporting them.
4. We need clear understanding of how ORS and ITSD operate.
5. We need to be able to measure and hold people accountable to the measures.

"Each Business Process Owner has a specific set of accountabilities. The NFT recommendations include an extensive list of what each will be expected to manage.

"The Business Process Owner is accountable to ensure that the process runs effectively. The ITR Technology Owner owns the technology and

works with the Business Process Owner to identify opportunities for technology to improve the process. The ITSD Technology Provider works with the ITR Technology Owner to identify the specific technology solutions and technology performance standards.

"This creates a set of 'Triads' dedicated to the specific Business Function. Each Triad will be accountable for the specific business process and the technology developed for each.

"These owners can work together effectively to create successful technology implementation by following the new Operational Processes between ORS, ITR and ITSD. These processes resolve most of the challenges faced by ITSD and ORS in the past. They provide a

clear path for technology to be driven by the business, and provide



Sylvia Maat, left, Eve Baumgart, and Cindy Adams won dinners at the Texas Roadhouse.

effective methods to deal with issues and resolve changes within projects.

"Why are these important?" he asked. "ORS is one of the largest pension funds in the WORLD! What kind of commitment comes with that ranking? With roughly 400,000 active customers and 160,000 retired customers, we have a huge commitment to assure that their records, accounts and pension obligations are reliable, accurate and complete," Dan concluded.

The second half of the article will appear in the next issue of the *LookOut*.



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Six Weeks to Wellness kicks off in ORS on April 17

Six Weeks to Wellness (6W2W) is an annual program for State of Michigan employees to promote a healthier lifestyle. This year the program will run from April 17 to May 28. Any ORS staff (including family of staff) may participate, either as a member of a four-person team or individually.

6W2W offers two levels of participation—level one is basic, focusing on eating properly and exercising, while level two is more intense and geared towards those who practice healthy living on a daily basis year-round. Participants earn points for healthy habits and record them in a Six Weeks to Wellness booklet.



For those who want to compete for prizes, there will be a \$5.00 entry fee. There is no fee to participate if a person doesn't want to compete for prizes. **Entry fees and registrations are due April 14.**

A 15-minute kickoff event is scheduled for 1:30 p.m. on Monday, April 17. Participants will have a fun, stress relieving activity that will also assist with setting goals for the six weeks.

Other events include the annual Best Team name/Individual name contest, Wellness Bingo, a weekly drawing for those who meet the goals set the first week, Exercise Poker for those

meeting weekly exercise quotas, and Brown Bag View and Chews—health-related videos during lunch. At the close of the six weeks, team/individual winners will be announced.

If you have any questions, contact **Lisa Schmidt**, the 6W2W coordinator for ORS. She says, "If you cannot find a team to join, notify me because we have had great luck matching up teams with participants in previous wellness programs." Lisa encourages everyone to join 6W2W and begin developing some healthy eating and exercise habits. She says, "Let's have some healthy fun!!"

Reminder

The Waterford Outreach Office is now closed.

Balanced Scorecard

Continued from Page 1

plan. The BSC validates leadership commitment to the strategic plan. It will assist in identifying and overcoming obstacles on the path to the DMB vision. The proposed initial BSC includes the ultimate measures of customer and employee satisfaction. Many of the other measures focus on department wide actions and behaviors required to implement strategic initiatives.

Since the strategic initiatives were designed to drive DMB to its vision, measuring their implementation and success provides a constant view of progress. Once initial implementation has occurred, the BSC measures will change to focus on effectiveness of the various efforts.

The BSC has been drafted and will be going to the DMB Leadership Team for modification and/or approval.

Once it is approved, the BSC team will begin crafting the data collection system. It is anticipated that the BSC will become operational sometime this summer.

Thought for the Day

"They may forget what you said, but they will never forget how you made them feel."

- Carl W. Buechner

Forms review schedule implemented in ORS

In an effort to maintain an accurate and up-to-date forms library and database, the Communications staff recently implemented a forms review schedule. This new schedule helps to make sure that every form used in ORS will be reviewed at least once in a 12-month period.

"It's really a proactive approach

to making sure that our forms are revised, consolidated, or eliminated in a timely fashion," said **Laurie Hill**, Customer Service Manager.

A certain number of forms are scheduled to be reviewed each month. Subject Matter Experts (SMEs) will receive a memo asking them to review a particular form and make any

changes that are necessary. This new schedule is helping ORS to become an innovative, flexible, customer focused organization.

Special thanks go to Student Assistant **Marisa Nedock** for her efforts in helping to implement this procedure.

Updated Policies and Procedures

Check out these new and/or revised Policies and Procedures. You can find them in the pol_proc directory in the FSRetirementShared@DMBRetirement2.Procedures:

- CS9** Logging, Processing, and Erasing Forms Request from the Electronic Call Processing (ECP) System
- ORS48** Processing and Forwarding Records to the State Record Center
- ORS66** Retrieving documents from Record Center
- ORS71** Reimbursing the State for Personal Long Distance Phone Calls
- FA104** Using Laminating Machine
- FA106** Preparing for an Orientation
- FA109** Salvage

The following Policies and Procedures are now obsolete.

Policy:

- FA75** Proofing and Inserting Microfilm
- FA84** Records 3A handling faxes

Procedure:

- CS8** Processing forms requests from incoming members and other MPSERS departments

Training for on-line Time & Attendance set

Reminder: Time & Attendance Training for on-line entry is coming April 20 or April 24.



Check with your supervisor for date and time you are to attend.

No more paper time sheets!

Comings and Goings in ORS



Diane Wells joined Customer Service on April 3 and will be working in the CIC. She comes to ORS from the Michigan Economic Development Corporation—Travel Michigan. She is a 20-year State employee.

Michael Bialkowski is a new Student Assistant in the Director's Office. He attends Lansing Community College

where he is enrolled in the Fire Science curriculum. He joined ORS on April 3.

Amanda Schoeler moved from Administration to the Report Processing Unit on April 3.

Karen Dymond left ORS on March 30 to spend more time with her family. She has worked for the State six years.



Mike Bialkowski



CIC area expansion will improve customer service

The Customer Information Center (CIC) has recently hired two additional staff members. As a result the call center is being expanded to accommodate this growth. This will also allow ORS to make our counseling area handicap accessible.

The CIC was created in October of 1997 to answer the majority of phone calls to ORS without the need to hand the customer off to another staff

member. And while this goal has been achieved with flying colors, as ORS Director Chris DeRose has been predicting for the past several years, our customer base is growing as more members either retire or near retirement age and have more questions. The two new staff members will allow CIC to handle this growing volume of calls.

CIC will expand into the area now used for the two

counseling stations for walk-in customers. The counseling stations will be moved, expanded, and made handicap accessible. The stations will be relocated directly ahead of the double doors as a customer comes into the ORS area, to the left of Conference Room N. In addition to offering more room, the new arrangement will provide more privacy for customers. These changes are scheduled to be completed soon.

DMB Recycling Guidelines Updated

The Department of Management and Budget recently published updated recycling guidelines. Processed paper should be separated into four categories: white ledger, mixed, cardboard and newspapers. White ledger consists of such things as



letterhead, copy paper, forms and envelopes without cellophane windows. Mixed includes any color

other than white or off-white, including advertisements, booklets, brochures, carbonless forms, envelopes with windows and gummed labels, and sticky notes. Cardboard consists of clean, flattened cardboard.

The following paper products cannot be recycled: wrappers on a ream of copier paper, magazines, Tyvek envelopes,

plastic, banding material, carbon paper, Styrofoam, brown envelopes, brown file folders, brown paper including lunch bags, food waste (including paper cups and plates, napkins, wax paper, candy wrappers or paper towels), gray boxes or trash. Please discard any such items in the trash.

Error in Public School Guidelines

The latest version of the Public School Employees Retirement Guidelines has an error in the section on the Equated Plan. One of the diagrams that compares a retiree's pension benefits under a regular retirement plan to those received under the Equated Plan has an incorrect reference to one of the elements.

On page 39, the "With Equated

Plan" diagram shows at age 62, a pension made up of two elements – the "Social Security Benefit" and "Pension Amount Unchanged at 62." The lower descriptive title should read: "Pension Permanently Reduced at 62."

Previous editions of the Guidelines have the correct references, and the version of the Public School Employees Retirement Guidelines found on our web site has already been corrected. The error will be fixed in the next edition.

Please share this correction with any customer who questions the diagram.

ORS sets phone record!

On Monday, March 27, ORS set another record, handling 1,360 telephone calls and smashing the previous record of 1,266.

AGs staff forges closer link with ORS!

You may have seen some new faces in ORS beginning this week. The Attorney General's staff members who work with retirement issues now will be coming to ORS twice a week on a regularly scheduled basis. **Dave Balas** and his staff, **Alan Lambert**, **Michelle Rick** and **Stephen Rideout**, will alternate.

Says Dave, "This is a way to improve our access and working relationship with ORS. While members of my staff and I are out



ORS' link to the Attorney General: standing **Alan Lambert**, left, and **Michelle Rick**; seated **Stephen Rideout**, left, and **Dave Balas**.

at ORS on a regular basis, it was felt that establishing regular office hours there would improve communications and services. It's an opportunity to get to know one another better and ensure better communications. We want to provide the best legal representation possible to ORS."

For those designated ORS staff who deal with legal issues for ORS, this is a great opportunity to meet personally with the AG staff.

Quick, no-cost phone number access is on your computer!

When you need to call a customer and don't have their phone number, did you know it costs the taxpayers of Michigan 75 cents every time you call information? But there's an almost no-cost alternative.



Open Microsoft Internet Explorer on your computer desktop and type in <http://www.infobel.com/international/usa.asp> and choose the link for WHITE PAGES. If you type in the name and city, many times you will get the customer's phone number in a matter of seconds.

This Scramble is no tall story!

Your friendly Scramble editor may be putting his neck on the line, but he wants to tell you something that's no tall tale: You only make progress when you stick your neck out . . . unless you're a giraffe with laryngitis, that is. So stick your neck out and solve this issue's Scramble. You'll reveal a pearl of wisdom that will make you stand out from the crowd when you put it into use.

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The answer will be printed in the next issue of the *LookOut*.

