

ORS Look Out

Year 2000



182 Days

July 16, 1999

Volume 2, Issue 25

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

July

State Employees Board
Meeting ----- 22nd
Pension Paydate ----- 24th
ORS Picnic ----- 30th

August

Judges Board Meeting --- 10th
DMB Celebration ----- 11th
State Employees Board
Meeting ----- 12th
Public Schools Board
Meeting ----- 20th
Pension Paydate ----- 25th

Strategic Planning Teams establish charters

On Wednesday, June 30th, the ORS Strategic Team met to discuss the charters that each team had drafted. Charters included the following components: Purpose, Ground Rules, Tasks, Boundaries, Meetings, Measures of Success, Completion Dates, Resource Identification, and Reporting Status. A copy of the Strategic Plan and team charters are available in the Resource Library.

The individual teams will now begin working to draft a work plan. The work plans will include a rough outline of what needs to be done in order to accomplish the team goal, a sequence of actions to be taken to complete the outline, and estimated time allocations for the actions that are listed.

Ken Theis gave a presentation on how the Strategic Teams relate to the New System Project/New Foundation Team. This team is examining the working relationships and processes between ORS, ITR, and ASD. Team members include **Fred Covert, Murphy Cutler, Andy Dagnault** and **Judy Simon**. As the project develops they will look to the Strategic Team for key information that can be used to improve services to our customers and respond to increasing demands in the future.

The Strategic Team invites your input on the 13 strategic initiatives. Submit your ideas to individual team members, and help make ORS a pacesetter organization.

Reporting Instruction Manual undergoes revisions

Recently, the Reporting Instruction Manual was revised to include information on the Tax Deferred Payment (TDP) Program, Member Investment Plan (MIP) Window, Diskette Reporting, and Short Term Disability sections. Information on the Unremitted Member Investment Plan (UMIP) Project was also included.

The Reporting Instruction Manual is distributed to approximately 800 public school reporting units (school districts) and provides

them with information on reportable compensation, who is reportable and who is not, changes in Retirement System law, reporting format requirements on TDP, MIP Window, quarterly reports, etc. It is specifically aimed toward the payroll staff that complete and remit the required quarterly reports and monthly contribution payments to ORS. Special thanks to **Cindy Adams, Rosemary Baker, Mary Picken, Carla Price, Alice Semevolos** and **Darlene Workman** who helped make this happen.

Spotlight on Office of Retirement Services Board members

Michael E. Cassady, Public School Employees Retirement System Board Member



Michael E. Cassady

Mr. Cassady, a member of the Board for six years, is the Director of Communications for Fraser Public Schools and a part-time teacher.

Mr. Cassady enjoys serving the dedicated school employees of Michigan, and takes his role as a Board member very seriously. He finds planning a future benefit for people who educate and care for Michigan's children an important and rewarding role. He had this to say about the Retirement System, "It will one day support me in retirement too, making it a personal goal to keep it viable and dependable."

He holds bachelors and masters degrees in education, a masters degree in education administration, and is a certified teacher and administrator. His favorite quote is "Children are the living message we send to a time we will not see" by John Whitehead.

His hobbies include photography, reading, golf and travel. His family includes his wife, two adult children, and two granddaughters.

Eric E. Doster, Judges Retirement System Board Member



Eric E. Doster

Mr. Doster, a member of the Board since 1996, says he enjoys his position, "Since Michigan's justices and judges provide a tremendous benefit to the people of the

State of Michigan, I enjoy my role to help protect their retirement assets."

Mr. Doster also added, "What impresses me most about the Office of Retirement Services is the sincere commitment to service the needs of the Judges Retirement System."

Mr. Doster enjoys spending time with his family and he has an interest in politics. Currently, Mr. Doster is a partner for the Lansing law firm of Foster, Swift, Collins & Smith, P.C., where he is a general practitioner. In his free time, Mr. Doster likes to play tennis.

Thought for the Day

Some never get started on their destiny course because they cannot humble themselves to learn, grow, and change.

— Casey Treat

Quick Reference Guide receives update

The Quick Reference Guide that shows a comparison of all four retirement systems was recently updated by **Ben McIntire** to include a table of contents complete with hyperlinks to the various sections of the document. This new feature allows a user to simply click on the page number assigned to a particular topic and jump right to that section without having to scroll through the entire document.

The guide is very useful for a quick review of a particular topic, especially when the answers may differ depending on the system in question. It is also useful as a tool for training new employees. Information in the guide is updated each quarter. The guide is located on the FSRetirementShared drive at: F:\Mpsers\H2o-ford\Qwkref.doc. If you have any comments or suggestions please contact **Mike Novak**.



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Service Credit & Special Projects join forces

On July 6th the Service Credit Unit and the Special Projects Unit joined forces. This new alliance brought all of Customer Accounts into one area. There are several benefits to the move besides the most obvious one of having these units together in one area.

Combining Service Credit with Special Projects personnel improves the ability to cross train staff to perform State Employees and Public School Employees billings, evaluations and Tax Deferred Payment (TDP) purchases, as well as assisting with refunds. This allows the staff in those areas the ability to realign their resources during peak times to accommodate surges

on their services.

The change also positioned staff to work with the entire unit to suggest change agent recommendations that improve the work along all lines. Customer Accounts Manager **John Donovan** had this to say, "Being together in the same work area will foster communication and help define opportunities to improve our processes, resulting in even better service to our customers."

Finally, combining the two teams allowed the Leadership Team to designate **Andy Daignault** as a member of the New Foundation Team. Andy will have the opportu-

nity to dedicate his time and energy to this important undertaking for the next 90 days. As the New Foundation Team will be one of the most important driving forces in the direction of ORS for years to come, this decision was significant to the future success of ORS.

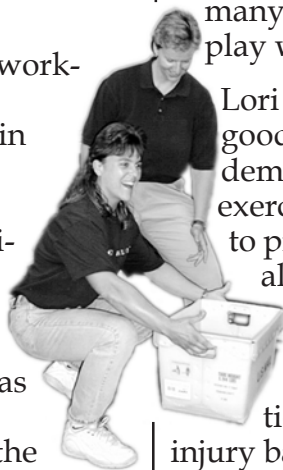


Above: Grace Bonofiglio (right) and Mary McGlashen (left) look over some information in Customer Accounts.

Finance and Administration staff receive back training

Lori Webster, a physical therapist from Ingham Regional Medical Center, presented an on-site Back Injury Prevention workshop for ORS Administration staff on Wednesday, June 30.

The objective of the workshop was to present helpful information in understanding and applying the basic concepts of appropriate body mechanics while at work and at home. Administration staff, as well as other ORS staff, do some lifting during the course of the work day. Learning proper lifting techniques is a valuable tool in preventing back injury. Ad-



ministration employees learned that proper material handling techniques, strengthening muscles, good diet, adequate rest and staying in shape all help ensure many hours of work and play without pain.

Lori presented rules of good body mechanics and demonstrated stretching exercises that can be done to prevent injury. She also evaluated the lifting techniques of each staff member, and offered suggestions for avoiding injury based upon individual personal needs.

Prior to the workshop, Lori conducted an on-site evalua-

tion of the Administration work area and met with employees to determine the kind of lifting and material handling performed during the course of the workday.

Currently, ORS Administration is working with **Steve Monet**, DMB Safety and Health Coordinator, for ways to expand our health and safety program.

A health and safety assessment of ORS was recently conducted and a video about back injury prevention will be available for viewing on a regular basis. In an effort to keep ORS staff happy and healthy, additional training programs are underway.

Governor signs earning limitations bill into law

Recently, Governor Engler signed a bill that affects earning limitations for public school retirees. The provisions of this bill are:

- 1) The earning limitations for MPSERS retirees remain at 1/3rd of the Final Average Compensation (FAC).
- 2) Permanently eliminates earning limitations at the seven four year universities for those who were formerly teachers or administrators and are subsequently em-

ployed at one of the four year universities as a teacher or in a research capacity. However, these retirees would not be eligible for a re-computation of their retirement pension.

- 3) Suspends the earning limitations for a period of three years for a retiree who is employed as a teacher or principal by a reporting unit that has an approved emergency education situation or hired in an area that has been identified as a critical shortage discipline.

Further details on these emergency situations will be coming soon.

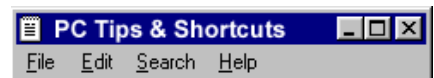
Only a retiree who retired before 7/1/99 and is subsequently hired by a reporting unit in an emergency situation can have the earning limitation suspended. However, these retirees would not be eligible for a re-computation of their retirement pension. The emergency provisions end on July 1, 2002.

Summer rush is upon us!

No, it's not the rush that fraternities put on to recruit new members. It's the rush that public school employees who are eligible for retirement make for ORS. July and August are typically the busiest months for the Claims Processing Department. **Pam Kibby, Nancy Quick** and their crews start preparing for this increased business each year in January. During a typical month the Claims Processing division will add between 200 and 400 new retirees to the pension payroll. During July and August they see almost a ten fold increase in the number of applications that need to be processed. This year 1,970 new retirees were added to the payroll in July. August will be busier yet!

This year brought two new changes within Claims Processing: 1) The new Benefits Processing system and 2) The Tax Deferred Payment (TDP) program. Despite these new challenges, the Claims Processing team stepped up to the task at hand.

Special thanks go to **Joy Bartell, Mike Novak, and Kathy Tober** for helping to keep correspondence current, and to answer phones. Also, appreciation to CIC for fielding more phone calls, and adjusting their schedules to help, and to **Lori Christiansen's** staff for their assistance. The extra-mile effort exerted by all who helped is greatly appreciated. We couldn't have done it without you!



Here is a PC tip to speed things up in your daily word processing here at ORS. Give it a try and you'll be flying through your work in no time!

Faster Horizontal Lines -

Have you ever had that urge to add a horizontal line to your Microsoft Word document to separate different sections of the document? This quick short cut will save you from having to go down the trail of multiple pull down menus and mouse clicks:

To create a single horizontal line from margin to margin, go to a blank line, type four dashes (- - - -), and press *Enter*.

To create a double horizontal line from margin to margin, go to a blank line, type four equal signs (=====), and press *Enter*.

ORS uses LISTSERV to communicate to HR offices

You say, "What is a LISTSERV?" Well, let us tell you. LISTSERV is a system that allows you to create, manage and control electronic mailing lists (or e-mail lists). Anyone with an Internet e-mail address can subscribe to these lists to receive periodic communications from ORS.

Following are the list names and intended users of the five LISTSERVs that have been set up for ORS to use in communicating to Human Resource offices throughout the state.

ORSschooladmin – Public school superintendents, presidents, and department heads

ORSschoolpay-pers – Public school human resource and payroll staff

ORSjudges – State court administrative human resource staff

ORSstateHR – State employees human resource staff

ORSstpol – Enlisted state police human resource staff.

The LISTSERVs are maintained by list owners. The list owners here at ORS are **Rosemary Baker, Matt Beha, Robert Glennon, Laurie Hill, and Ken Wright**. Only the

list owners have the ability to send e-mail messages to the subscribers.

Inserted in this issue of the *LookOut* is a memo and subscription instructions that will be distributed to the Human Resource offices. Please take a moment to read over this information, follow the instructions, and subscribe to the lists so you can be aware of information that is sent to the HR offices. If you have any questions contact **Ken Wright** at 2-6038.



Above: (left to right) Steve Hackney from Automation Services Division (ASD), John Cook, Tim McCormick and Judy Ferrigan from Property Management Division, and Cathy Pelham from ASD visited ORS on Wednesday, July 14th to glean from our experience in call center management.



Above: DMB Director, Janet Phipps, visits ORS to present Barbara Kirkland with a plaque for her winning entry for naming the new DMB newsletter. Barbara's winning entry was "Inside DMB." The newsletter will debut with its new name in August.

Spotlight **On Kathy Hankins**

Welcome to the Spotlight, where we learn a little more about some of the people we work with.



Kathy Hankins has been a State employee for 11 years and has worked for ORS in Operations since 1994.

While she is away from ORS Kathy has another life of tutoring. She took a course at MSU through the Literacy Coalition and has since tutored adults and kids. She says, "It is a very big commitment, but the satisfaction I feel is well worth the effort. It amazes me that a young adult can graduate from high school and still be functionally illiterate or that a child

could make it to the 7th grade and not know how to subtract, multiply or divide. These kids are not dumb...they just don't learn the conventional way and most teachers have so many kids in the classroom, they don't have time to give individual instructions. If you have some extra time and like kids, I would highly recommend tutoring."

Kathy enjoys reading and woodworking. In the past, she has been very active in the Grand Ledge community with the Historical Society, Ledge Craft Lane, and St. Michael's Church.

Kathy's husband, Dave, plans to retire from GM in a couple of years. They live in Grand Ledge where they raised their two sons. Her son Nick and his wife Janel are expecting their first child in September. Kathy said she loves being a mother, but will enjoy spoiling her first grandchild even more.

Comings & Goings in ORS



Kimberly Pulido

Kimberly Pulido will be working with Finance and Administration in Report Processing. She comes to ORS from the Michigan Department of Consumer & Industry Services, Liquor Control Commission.

Michelle Twichell's last day at ORS was Thursday, July 15th. She will be going to work for the Family Independence Agency as a Family Independence Specialist. Congratulations Michelle on your new job! You will be missed!

**Don't forget the
ORS Picnic on
July 30th!**

Put on your thinking cap and solve this Scramble!

Your friendly Scramble Editor was a pilot during his military service. Someone would lead him to a huge stack of very heavy material and say, "Pile it over there." Obviously his aspirations of a flying career got grounded pretty quickly.

Don't let circumstances get you down, though. Unscramble these words to find an inspirational flight of fancy. Then put it to work in your daily life.

The unscrambled posters will be on display in ORS next week.

