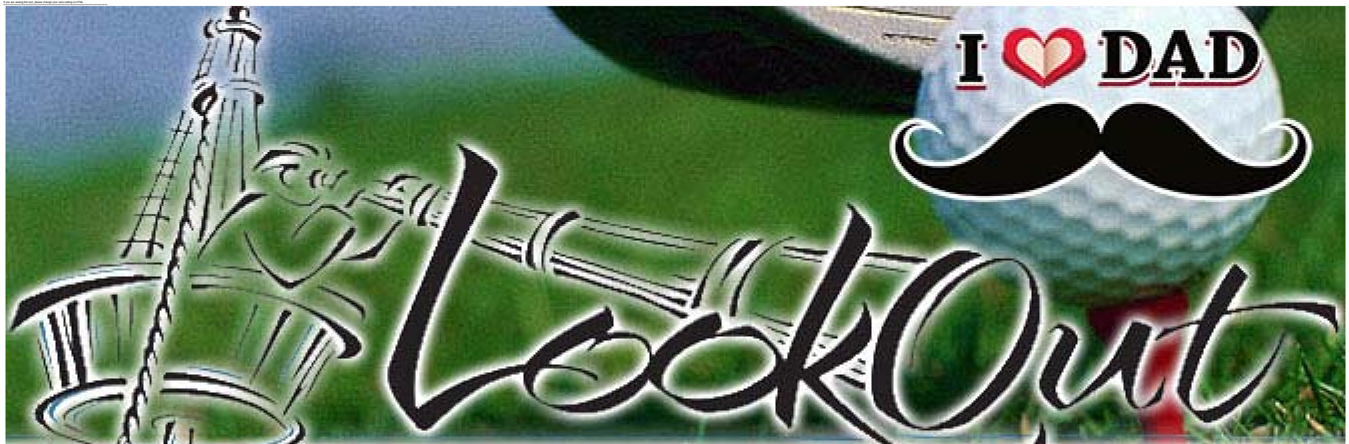

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On The Horizon

- Independence Day - July 4
- State Police board meeting

Board meetings, behind the scenes!

The gavel has hit the wooden block and the board meeting has begun! Board meeting days are exciting and informative. The meetings, which are open to the public, allow for the board to share updates and the progress of the corresponding retirement system. To ensure success, there's a lot of work before, during, and following each meeting. Although the meetings themselves may only take a couple of hours, the preparation can take anywhere from days to weeks in advance of the meeting.

The recording secretary of the board, either **Chanda Donnan** or **Sara Hoppes**, works with the executive secretary of the board (**Phil Stoddard**, **Laurie Hill**, **Laurie Mitchell**, or **Anthony Estell**) and the board Chair to establish meeting dates for the year and set agenda topics.

Weeks before a board meeting, the recording secretary gathers items for the agenda from various places including the Attorney General's office, staff within ORS, the Bureau of Investments, and our actuarial or insurance partners. Once everything is collected and the documents are extensively reviewed, the agenda is finalized and an agenda packet is printed through DTMB Printing Services, then assembled in binders, and mailed to the board members for examination. In the near future we will supply agenda packets electronically to board members.

During the board meeting, the executive secretary's role is to assist the chair. While the recording secretary's role is to record the actions of the board for meeting minutes, assist the executive secretary as needed, and ensure the room and equipment are ready for use. Both the executive and recording secretaries need to understand the agenda items in order to assist with questions, have a working knowledge of Robert's Rules of Order, and expect the unexpected.

After the meeting is adjourned the meeting minutes are prepared for approval at the next meeting and are then posted online and kept for historical reference. The whole practice explained above will begin again shortly, as there are 17 planned board meetings for the year of 2014 alone.

- July 17

- State employees board meeting
  - July 24
- Public school board meeting - July 31
- ORS Golf Outing
  - August 14

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, Anthony, and Kerrie)*
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

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ORS business plan updates

We're already more than halfway through the fiscal year! Here are some updates on business plan items we talked about back in the fall of 2013.

Employer Reporting
Business Process Reengineering (BPR) is in full swing. We are in the second step of a multi-part construction process, with robust testing throughout each portion of the process.

We've completed and tested the part of BPR that deals with Detail 4 records, the new records that transmit Pension Plus contributions to ING, and pay cycle reporting requirements.

The next part will automate state employee's overtime calculations for pensions and the public school new hire election (they choose DC or Pension Plus) process into Clarety and is currently underway.

Customer Service
For the Insurance Process Redesign (IPR), the first stage covers changes to how we maintain retiree addresses in Clarety. Each retiree will have three addresses – physical address, mailing address, and Power of Attorney/Conservator/Guardian address (optional). This will make it easier for us to properly communicate with customers while complying with Medicare rules which require a physical address (no PO boxes). It will also provide a standard method for maintaining and using POA/Conservator/Guardian addresses when we need to.

Design is underway with testing to begin in a few months. We are targeting to have these changes in before the end of the year.

Benefit Plan Design
Health Initiative Strategic Plan and Process: BPD won a 2014 Truven Advantage award for last year's strategic initiative process, and they're back to work on this year's plan. We'll share more info as it becomes available.

Diversification campaign: ING mailed brochures to nearly 12,000 members who were only invested in one fund for their retirement savings. The campaign caused many people take action on their account. Not only did some customers change their allocations, but some changed their investments around, increased contributions and improved their overall account health.

Process Support
Process Support is nearly done with the first part of retention schedule updates. With input from other ORS staff, they have been reviewing, consolidating, and updating ORS' agency specific retention schedules starting last fall. Process Support took 7 different schedules with more than 380 items, grouped all systems together, removed items that are already covered by State of Michigan retention schedules, and whittled it down to one schedule with 76 items. The final draft is completed and the finishing touches are being added.

Once the final draft is ready to share, the second part of the plan will be to train staff on the changes.

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UAT	User Acceptance Testing

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

Clean desk and confidential recycling

Did you know that ORS administers and enforces a confidential recycling policy to help improve information security?

Here is where you can confidentially recycle different items:

- All paper regardless of color can go in the gray confidential recycling binds located throughout the office and near printer/copier areas.
- Magazine and cardboard should be placed in the blue recycling bin in Central Perk.
- CDs, floppy disks, fiche and other media should be recycled in the 3 smaller receptacles that are located:
- In the B-Wing in the Document Management area, just outside the mailroom.
- In the A-Wing; one is near the Customer Service entrance at Pillar F4.
- In the A-Wing in the Customer Service Analyst pod at Pillar B3.

Please throw media cases into the trash.

Some additional actions you can take to improve information security are:

- Do not print anything with member information unless it is absolutely necessary.
- When printing is necessary, confidentially recycle the hard copies in the bins provided, as soon as you are done with them.
- At the end of the day, secure any confidential documents in locked cabinets, either in your office or in the common area assigned to your process.
- For long-term use, consider scanning paper items and filing them electronically.
- Remember to delete the scanned image from the multifunction machine, and save your images in a secure location, labeled appropriately.
- Make sure printouts containing secured information are not left in the printer areas.
- All documents found at the printers at the end of the day should be confidentially recycled.
- Do not leave passwords visible in your work area.
- Do not leave your ID Badge lying on your desk unattended.
- Do not leave confidential/sensitive information on white boards or pinned to bulletin boards.

For additional information you can refer to the following policies and procedures in the Knowledge Library:

- ORS Policy, **Receipt of Faxes and Printing of Member Documents**
- ORS Policy, **Confidential Recycle Policy**
- ORS Procedure, **Gaining Access to a Confidential Recycle Bin**

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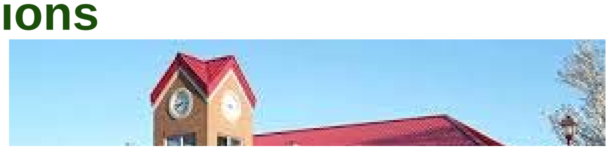
Retiree organizations



Several retiree organizations serve the same customers as ORS. These organizations exist to advocate for retiree interests in the legislature and to provide important information to their members both before and after retirement.

Although some groups like the Michigan Association of Retired School Personnel (MARSP) conduct meetings of their own—MARSP conducts Pension 101 seminars—at times groups will work in partnership with ORS to provide information, especially during times of complex change.

“I was asked to conduct a couple of Saturday meetings over the past two years,” said **Joy Bartell**, a presenter in CE. The Coalition for Secure Retirement is made up of members from a number of different public employee unions. “They asked us to conduct portions of our preretirement meeting at their annual meeting in the fall,” Joy continued.

At many public school Preretirement Information Meetings, MARSP representatives pass out membership materials and sample copies of their Vanguard newsletter. During Preretirement Orientations for state employees, a representative from the Michigan State Employee Retirees Association will conduct a short presentation highlighting the benefits of membership right at the end of the seminar.

Despite the political nature of these organizations, we at ORS work together with retiree organizations to provide mutual customers the best information and great customer service.

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Blue Cross seminar reinforces Medicare message

As part of the new workshops that provide general information to retirees with Blue Cross Blue Shield of Michigan (BCBSM) health insurance, BCBSM highlighted some of the important things that our retirees need to know while on Medicare.

These workshops discussed what a Medicare Advantage plan is, requirements for enrollment, and how retirees can get the most out of their plan with “the blues.”

Although most of the information was specific to Blue Cross, there was some information that was covered which helps reinforce the messages ORS gives to customers over the phone, on the web, and in our forms and publications. This included the need to sign up for Parts A and B to be eligible for Medicare Advantage coverage, and details about filling out the verification of coverage and what happens if they don’t.

As insurance calls and questions tend to be a large part of our calls and message board questions, anything that can help make our members’ lives easier will help everyone and us for getting less calls.

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World’s largest Oldsmobile car show returns to GOB

The 22nd Annual Oldsmobile Homecoming Car Show and Swap Meet will be held once again at the General Office Building parking lot this Saturday. Billed as the largest one-day Oldsmobile show in the world, this year's show will feature the 50th anniversary of the introduction of the Oldsmobile 442, a muscle car first introduced as an option package on the Oldsmobile F85 in 1964. For more information about the show, visit http://www.reolds.org/

Details:

- 22nd Annual Oldsmobile Homecoming Car Show and Swap Meet
- Saturday, June 14 from 9:00 a.m. to 3:00 p.m.
- General Office Building parking lot
- Hosted by the R. E. Olds Chapter of the Oldsmobile Club of America

Did you know: Ransom E. Olds, who founded of Olds Motor Vehicle Company in Lansing in 1897, owned an elaborate mansion on S. Washington Avenue which featured a turntable in the garage which allowed Olds to pull in at night and leave again the next morning without driving in reverse. The mansion was demolished in 1971 to make way for Interstate 496, which ironically was then named for Olds himself.

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Effective Communication

Elaine Scott, CS, introduced a new training on June 5. Twelve CS departmental technicians participated in the first half of *Effective Communication* training on June 5. After a presentation on the communication cycle and possible barriers to good communication, participants focused on four key skills that aid effective communication: listening, nonverbal communication, managing stress and emotional awareness. For the second half of the effective communication class on June 19, participants will be presenting a role play to illustrate a communication struggle and how the customer interaction changes when we use effective communication skills.

The Pursuit of Excellent Customer Service

On Thursday, June 12, **Tim McCormick** facilitated *The Pursuit of Excellent Customer Service* training. The following employees attended the training: **Lisa Arnott, Randy Bitner, Amy Buttery. Anastasia Ferguson-Nelligan, Kristin Forester, Joe Grinston, Jamie Guardiola, Ethan Hoppes, Autumn Hubbard, John Karagoulis, Kevin Kubacki, Seirra McNamara, Ted Minix, Jennifer O'Herron, Amy Price, Omair Siddiq, Jon Slaughter, Ryan St. Charles, Richard Todd,** and **Gabrielle Whitfield.** One attendee shared, "I really liked the group participation. I was engaged the entire time."

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New tool for school reporting and payroll Staff

To assist school reporting and payroll staff with retirement-related tasks CE and ER developed an End-of-School-Year Checklist. This checklist reminds employers about tasks that must be completed for their employees who are retiring, terminating, or newly hired. It provides links to instructions and other resources to accomplish these tasks such as final payroll details (FPD) and other seasonal tasks. About 300 recipients viewed the checklist in the week after they received a link to it in an email.

Public School's actuarial valuation presented to the board

Each year the ORS actuary drafts an actuarial valuation for the Public School retirement system. This valuation is an overall financial picture of the system and details the current value of investments and the unfunded actuarial accrued liability. Unfunded actuarial accrued liability is the amount we owe for future pension payments that isn't currently covered by assets, and is being paid off over a 23-year period. Separate valuations are completed for the pension portion of the system and the retiree health care portion.

After review by the board, this valuation will be used to determine employer contribution rates for 2016. Our system uses an industry-standard method which smoothes out gains and losses over a five year period. This method keeps employer contribution rates fairly stable. The good news for this year is that the effects of the 2008/2009 recession has finally finished phasing in and will be moving out of these smoothing calculations, and also the recent reforms have proven to be very effective. This year's valuation shows the system moving in the right direction.

The ORS Engagement Survey closed Friday, June 6 with over 84 percent participation.

Click here to see the results. The members of the BLA will review the results of the survey for potential action items. The survey is conducted three times a year in January, May, and September.

Reserve the ORS Resource Library through Outlook.

If you're looking for a meeting space for a small group, the ORS Resource Library is available through Outlook. Include ORS-ResourceLibrary@michigan.gov in scheduling your new meeting. While in the library, check out the resources available, including books on sale through EMPAC.

New breakout space

Coming soon, ORS will have a new breakout area in A-wing at pillar B-5, near the Resource Library. It's still a work in progress, but it's accessible as a breakout space now.

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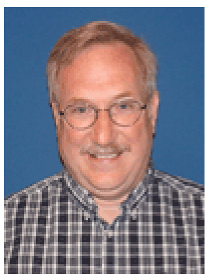
comings+goings

Feef Dillon is a new part-time employee in Customer Service where she started on June 9th. She has a Bachelor's degree in Business from Michigan State University, and has spent most of her career in pharmaceutical sales. She is from Duck Lake, Michigan and has two adult sons. Outside of work, she is very passionate about traveling. She has been to several countries, including India, Romania and Thailand, and will be headed to Ireland in the fall. She enjoys golf and MSU football, and even got to watch them win the Rose Bowl in Pasadena!



Rick Todd joined Customer Service on May 28th, where he will be working as a part-time employee. Rick lives in Charlotte, but is originally from Vermontville. He has three children, two of which live in Indiana and Florida, and seven grandchildren. He has a Bachelor's degree in Education from MSU, and spent twelve years as a junior high school math and science teacher. Rick has been involved with the Boy Scouts of America for the past 30 years, and has recently started a teen center in Charlotte.

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Friday the 13!

Beware, today is Friday the 13th! Traditionally this day is infamous for bad luck and negative superstition but is there a real reason to fear Friday the 13th? The famous lore began from biblical text as Friday was said to be the day in which the forbidden fruit was eaten and the day Jesus passed on. The number 13 signifies disorganization most importantly in numerology, because the number 12 is considered to be the representation of perfection and completion. It stands to reason that trying to improve upon perfection by adding a digit is a bad luck.

Here are some additional Friday the 13th facts:

- Most hotels skip the 13th floor altogether to avoid any concern from superstitious guests.
- Fear of the number 13 is known as triskaidekaphobia, while fear of Friday the 13th is known as paraskavedekatriaphobia.
- It is said that 21 million Americans fear Friday the 13th. People in Spanish speaking nations actually fear Tuesday the 13th.
- The ill-fated Apollo 13 launched at 13:13 CST on Apr. 11, 1970. The sum of the date's digits (4-11-70) is 13 (as in 4+1+1+7+0 = 13). And the explosion that crippled the spacecraft occurred on April 13.

So is Friday the 13th really a day of significance? First, it's not that rare. It happens at least once to as many as three times per year. Second, a 2008 Dutch study concluded that fewer vehicle accidents, fires and crimes arise on Friday the 13th.

Third, the 1980 Friday the 13th film franchise grossed $40 million at the box office proving people weren't afraid to sit in a dark theatre that day. There may be no significant evidence that Friday the 13th is unlucky but there will always be those who take extra care to avoid black cats and bad omens on this mysterious day.

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The goslings are back!

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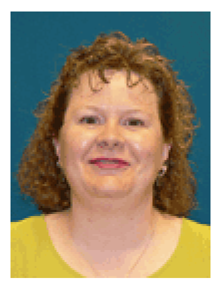
sounding out

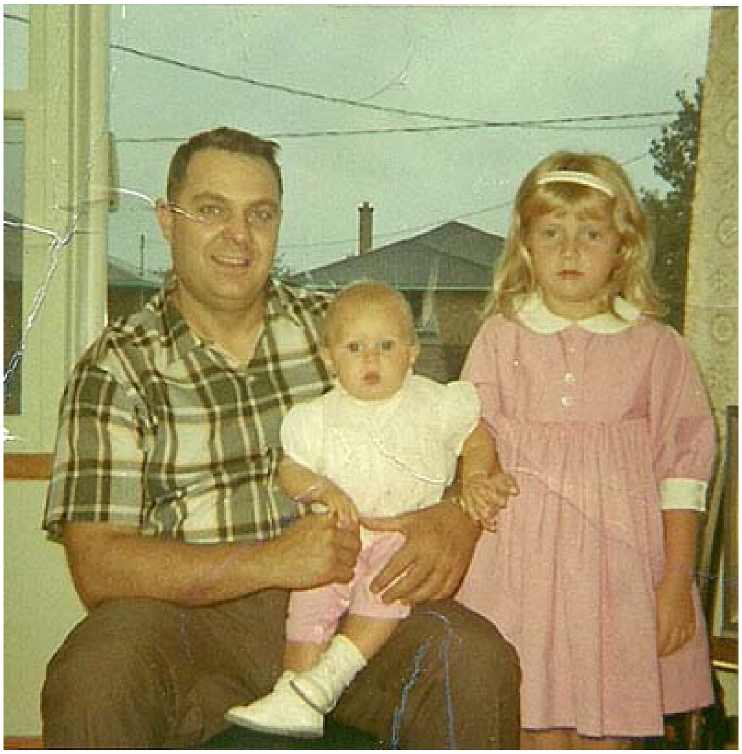
from you for you

Lisa Schmidt reflects on growing up with her dad.



My father will never be mistaken for Ward Cleaver. He's more like Frank Barone from Everyone Loves Raymond. Being the son of such a personality is a trying experience as Ray and Robert can attest to but being a daughter of one? Let's just say communication was at a minimum and he was a funny man in the advice department. Such as "Always park your car next to a car nicer than yours. If someone is going to steal a car, they'll take that other one and leave yours alone."

As the years went on, I still never quite figured out my father. He seemed to only care about my car and if work was okay. It never got much deeper than that. Then I bought a house. If I called my parents, my dad's questions consisted of "how's the roof holding up?", "furnace working okay?", "car running good?" If he was visiting: "I think your toilet needs an adjustment" and "you should get a better garage door". I realized that was as good as it was going it get with him and accepted it.



When my dad entered his eighties, he started dividing up his tools and cleaning out the garage. Every time I visited I left with a treasure trove of goodies: a ratchet set, a level, a saw horse, an electric sander and many other things. My most favorite take is a massive set of drill bits in every imaginable size. It didn't matter my brother got the drill. Those drill bits came in cigar boxes, Rubbermaid totes (where I found a metal file – woo-hoo) and a fabulous case that when you opened it up, it popped up into a stair-step like holder with all kinds of little bits.

One day when I had a door installer at my house, he needed a drill bit he didn't have. I told him my dad gave me a bunch of drill bits and come take a look. I brought him to my tool lair and displayed my inheritance. His eyes got really wide when I opened up that stair-step drill bit box and he said, in total awe: "Whaaaa-ooooowww!, your dad did take care of you, didn't he?". Then it hit me. My dad, who worked every day in a factory as a tool and die maker and often worked overtime 7 days a week. My dad who raised 7 kids that never went hungry or lacked for anything. My dad whose emotions could not be expressed any other way showed his love by making sure I was taken care of. Was my job going well? I'm not going hungry. Was my car running ok? I can get to my job. Was the roof holding up, the toilet running and the furnace working? Great, I'm surviving just fine.

I once read that just because people don't love you the way you want them to, it doesn't mean they didn't love you the best they could. I struggled with my relationship with my father. It took a kid starting a new business and hanging my doors without proper tools, looking in amazement at my amassed wealth of hardware to make me understand what my dad was trying to tell me all those years before.

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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Director:
Phil Stoddard

Edited by Customer Education

Thanks for reading!!

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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.