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Email the LookOut Staff



LookOut Archives

#### In This Issue

- Share and share alike: ORS presents at CEM Peer Conference
- Application processing season heats up
- Baking the ORS Facebook Cake
- Happy 2nd Anniversary online RIM
- Think you're finished with spring cleaning?
- Business Briefs
- Tech Tips: Update your calendar for summer AWS
- Spotlight on Amy Price: Be a Philanthropist
- Mark your calendar for the 24th Annual ORS Golf Outing
- Detroit's Eastern Market Flower Day
- Comings & Goings
- Staff Training
- Congratulations to our graduates!
- Local area activities and events

#### Calendar

## Share and share alike: ORS presents at CEM Peer Conference and gets great ideas back!

Earlier this month, **Laurie Hill**, **Ian Broughton**, and **Laurie Mitchell** participated in the Cost Effective Measurement (CEM) Benchmarking Peer Conference. This year, they went beyond participating by delivering two presentations, one on our social media implementation and the other on using data to drive communications. Both presentations were received very well by the group and sparked great conversation.

What is CEM? CEM conducts significant research for the pension industry. They meet with, talk with, survey, nag and otherwise pester the more than 75 pension organizations on everything from mail processing to online applications to investment practices. With this data, they provide comprehensive analyses that result in Best Practice determinations and in benchmarks to compare ourselves against. CEM is also an important collaborative peer group, and by attending this conference ORS gains insights into how other pension systems operate.



One of the highlights of the conference was hearing how the Ontario Teachers Retirement System developed a digital communications strategy for supporting a mobile customer base. Another highlight was hearing how almost every plan is focused on member engagement and interacting on a higher level with their customers.

"Laurie, Ian and I have met and are consolidating our notes of good ideas," says Laurie Hill. "Our next step is to share these ideas with the BPOs to see which ideas have potential to be added to our business plans."


[back to top](#)


## Application processing season heats up

With the outside temperatures on the rise so are the number of customers who are ready to retire from public school service. A dedicated team is now trained on application processing and moved to the pod in the back corner of A Wing.

<b>June</b>	
Judges board meeting	12
Flag Day	12
Father's Day	15
Summer begins	21

 On The Horizon	
• Independence Day - July 4	
• State Police board meeting - July 17	
• State employees board meeting - July 24	
• Public school board meeting - July 31	
• ORS Golf Outing - August 14	

 Quick Links	
• <a href="#">ORS Member Website</a>	
• <a href="#">ORS Employer Website</a>	

 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)

Processing supervisor **Jennifer Dunavant** remarks on some of the advantages of being in the pod: "The pod provides a focused team environment for the processors. This area supports learning, so as things come up that everyone would benefit from hearing and seeing, we can easily pull the team together." The processors moved to the pod May 6th and will continue to work from there through early August.



CS and CE collaborated this year on a new approach to application communication to keep members informed during the application process. Together, they built a process to query applications and send GovDelivery emails to applicants for June, July, and August to let them know we have their application and what they can expect as we process it.

**Ian Broughton** explains, "ORS has proven that using this targeted approach of identifying the message and sending it out to specific customers works very well. These personalized communications get the customers' attention and help us achieve our objectives."

CS also stopped sending a "request for additional information" letter, replacing it with a miAccount Message Board communication. This change can reduce the time delay between asking for more information and receiving it by as many as six business days.

**Andy Kolp** comments, "We are considering additional messages we can deploy as the July pension payday approaches to instill confidence and reduce pending retirees' need to call to check on the status of their applications."

Member outreach plans using GovDelivery have been successful so far. Andy also stated, "Our approach with the GovDelivery messages showed some promising results in April. Compared to last year, we experienced about 1,000 fewer Applicant/Retiring calls (a 44% drop in this category), and we had about 200 more retirement application Message Board contacts (a 54% increase). This is exactly what we wanted to see – customers calling us less about their application, and those who are contacting us, using the Message Board more frequently."

With preparation and a solid plan intact, the processing team is anticipating a strong season and anticipates meeting its goals.

[back to top](#)

## Baking the ORS Facebook cake

A successful content strategy for social media is like baking a cake. You want the cake to bake up beautifully and be delicious. There are a number of ingredients that are necessary to make the cake rise and have the right texture, like baking soda and eggs. There's a process to sifting everything together, mixing the batter and baking it correctly. You also want yummy frosting that looks attractive, so that people enjoy it and want to come back for another slice.

The necessary ingredients in our ORS Facebook cake are the posts that increase our member's knowledge and help take pressure off our customer service processes. These include our weekly posts urging our fans to use miAccount. We mix these with content that we curate from other sources, like news from *USA Today* or *The Wall Street Journal*. (These are the flour and sugar.) Through our content development process, we gather and sift everything together and bake it up.

The frosting is the occasional post that is more light-hearted or fun. This includes our



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
SME	Subject Matter Expert
UAT	User Acceptance Testing

popular monthly “Happy Pension Pay Day” posts. These graphic posts always bring out positive comments:

“Thank God, MI, taxpayers & all U folks at ORS.”  
 “So thankful for my pension & benefits!!!!!!”  
 “Very thankful for my time with the state and my pension and benefits...It was all worth it!”  
 “Love you people at ORS!”  
 “Just a thanks for all you do. Can't tell you enough how impressed I was with your people from my planning retirement to now.”  
 “It's Christmas every month!”

Facebook has an algorithm that determines whether our posts appear in our fans' news feeds. Part of this algorithm is that those who interact with us by liking, sharing or commenting see more of our content. This is why the “frosting” is so important! The more people interact with our frosting posts, the more likely they are to see posts about those “necessary ingredients” when we really need for them to.

[back to top](#)

**ORS Strategic Intents**



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

## Happy 2nd Anniversary Online RIM

In May 2012 the [Reporting Instruction Manual \(RIM\)](#) went online, allowing employers who report members' wages and make payments into the system to access and use the manual more easily, and allowing updates to be more immediate and less cumbersome.

What is the RIM, and why should you care? Without it, the reporting staff at each of MPSERS' more than 700 reporting units would be navigating the world of employer reporting without a map. Adapted from statute, board decisions, and retirement system policy, the RIM helps employers comply with the many reporting and payment requirements of the retirement law.



Especially since reform, staff at public schools' reporting units have a complex job. The RIM breaks the tasks of reporting to ORS into 15 chapters, each with 5-60 sections. It gives click-by-click instructions for the basics of employer reporting, such as providing demographic information (on Detail 1 records), wages (on Detail 2s), TDP agreements (on Detail 3s) and defined contributions (on Detail 4s).

It also provides answers to trickier questions such as:

- What wage code do I use for workers' compensation wages, or for a retiree returning to work?
- How (and why) do I report federally funded wages, optional retirement plan wages or unfunded actuarially accrued liability wages (or in ORS-speak, FF/ORP/UAAL)?
- What compensation is nonreportable—and when do I even need to tell ORS about nonreportable compensation?
- How do I report the hours of a bus driver who is paid by the run instead of by hours, so that he receives the correct service credit?
- When my school hires a member who has a TDP agreement at a previous school district, how do I get the TDP payroll deductions transferred smoothly to my payroll system?
- When a problem arises with a report, how can it be corrected to avoid problems



that will cause many hours to resolve?

Developed by Employer Reporting staff and updated regularly by **Deb Lawrence**, the online RIM also helps the Web Reporting call center staff answer questions. The caller can be referred to the relevant section of the RIM and take any questions from there.

Whether you work with employers every day or your perspective is from that of the active member or retiree, take a moment to reflect on how the RIM serves as a resource that helps keep funds flowing into the system so when a retiree needs that pension, the funding is there.

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[back to top](#)

## Think you're finished with spring cleaning?

It's been said "If a cluttered desk is the sign of a cluttered mind, what is the significance of a clean desk?" Earlier this month we broke out the cleaning materials and both Wings A and B spent some time organizing and freshening up their workspaces in preparation for the new season. However, our cleaning shouldn't end with just a sparkling workspace; our network drives can use some tidying up too!

Although it is easy to let your personal space on the network drive become a virtual junk bin, we all should be mindful to keep unnecessary or duplicate files from spreading across the ORS network drive and disposing of our unnecessary files properly. Although it's a shared space, please help your neighbor and take a few seconds to account for the files you place on the network drive. Here are ways ORS and Process Support address this issue:



- Establish a set folder structure.
- Name individuals to be responsible for setting the folder structure and naming convention.
- Teach employees about what types of documents and records we should keep and for how long.
- Encourage employees to clean up their folders on a regular basis.
- Ensure the proper security settings and security accesses are in place.

For more information on how to "spring clean" your computer, go to the Process Support KL page.

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[back to top](#)

## business briefs

**Summer AWS 2014 begins.** The summer Alternative Work Schedule (AWS) began the beginning of this week, on May 25, and will end Saturday, August 30, 2014. You can find the updated AWS lists [here](#).

**Call agents meeting connects ORS with partners.** On May 21, **Erica Waltz** hosted a call agents meeting, bringing together call agents from ORS and our partner vendors who provide our public school members with the best customer service possible. The purpose of the meeting was to build relationships with our

partners and do some networking. Erica used our video conference technology which allowed Catamaran to participate from Las Vegas, NV and Lisle, IL with BCBSM and ORS simultaneously. The group plans to continue meeting quarterly.

**New After You Retire book.** The May 2014 version of *After You Retire: What Every Pension Recipient Should Know* for public school retirees is now available online. Updates include more current insurance and working after retirement information. Printed copies will be available in a couple weeks.

**May is survey month.** All permanent staff should have received the Engagement Survey for May. You are encouraged to let your voice be heard and complete the survey. Also within the next few days the Employer Survey, Active Member Survey, and Retiree Survey will have all been sent. If you receive phone calls about these surveys, assure our members they did come from our office and encourage them to complete the survey.

**Message Board Common Responses updated.** This spring, CS, under the direction of **Katrina Kaufman**, had an opportunity to review, revise, and reorganize the common responses used to respond to members via the Message Board. The responses are now organized by the category the members select when writing to ORS, allowing for more efficiency when the agents respond. A soft roll out using the new method launched this spring with a complete rollout planned for this summer.

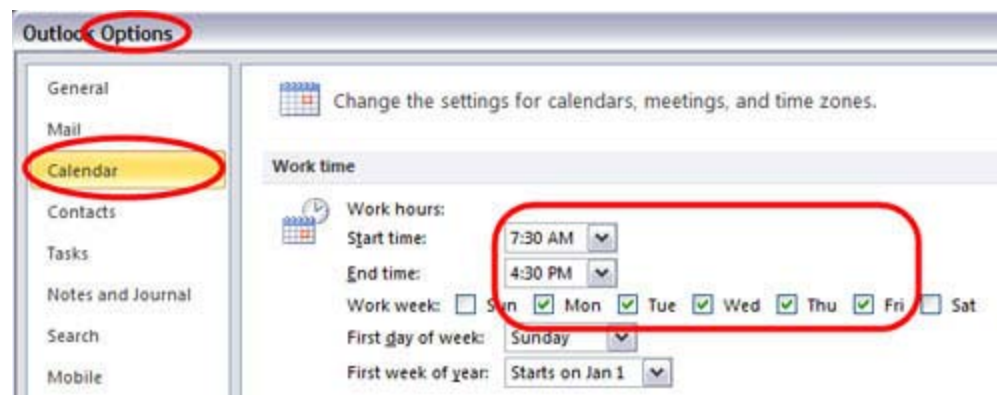
[back to top](#)



## Update your calendar for summer AWS

Because the summer AWS schedule is just starting, many of us may need to update our Outlook calendars to reflect a change in our work schedules. Here's a quick how-to just in case you're not familiar with the process.

1. On the File tab click Options.
2. Click Calendar.
3. Under work times, you can update your work hours and the days you work.



For those of you who have schedules that alternate from one week to the other, you aren't able to show this using the steps above; you will need to do that with out-of-office appointments. Once you create the appointment, you can use the Recurrence function to set your days off to match the time frame and frequency for the entire AWS period.

For example, if you have every other Friday off you would make the selections:

The screenshot shows the 'Appointment Recurrence' dialog box. Three sections are highlighted with red circles:

- Appointment time:** Start: 7:30 AM, End: 4:30 PM, Duration: 9 hours.
- Recurrence pattern:** Recur every 2 week(s) on: Friday (checked).
- Range of recurrence:** Start: Fri 6/1/2012, No end date (selected).

Buttons at the bottom: OK, Cancel, Remove Recurrence.

Keeping your calendar updated helps others schedule time with you as well as know when they may be able to contact you on short notice.

[back to top](#)



## Spotlight on Amy Price: Be a Philanthropist

Have you ever seen a problem or situation in our world and thought, "If I was a billionaire I'd give a few million dollars to fix it." In reality, we aren't billionaires and we also know that throwing money at a problem isn't always the solution. (Though it is often what fuels the solution.)

While we can't be like Bill Gates and work to eradicate malaria, we can be like Facebook CEO Mark Zuckerberg and give to our local community foundation. His gift of \$500 million to the Silicon Valley Community Foundation earlier this year was extraordinary, and it was a particularly wise choice. Community foundations are experts on what their community needs are, and are also experts in making wise grant investments. There is an art and science to grant investing, monitoring and measurement. Smart philanthropists like Warren Buffett and Zuckerberg know to leave it to the experts than try and do it themselves. (How many times have you heard a celebrity say "I'm starting a foundation" only to never hear of it again and the money has disappeared?)

If this is the first you've heard of the concept of a community foundation, here's what they do in a nutshell: gifts, growth, grants. People give gifts to the foundation, often through their estates. Through wise



investing, the finance officers and board grow the funds. Then income from these investments is given away in the form of grants and college scholarships. The principal stays in an endowed fund, which continues to grow and spin off income (hopefully) forever. Community foundations are public nonprofit organizations, unlike private foundations like W.K. Kellogg Foundation or the Ford Foundation. Anyone can donate and be a volunteer. They are bound by rigorous regulations and make their financial records and grant activities public. There's a great community foundation here in Lansing: Capitol Region Community Foundation.

<http://www.crcfoundation.org/>.

Why do I know so much about community foundations? For eight years I worked as a program assistant at Grand Rapids Community Foundation, a most excellent foundation staffed with amazingly smart people. After that, I was with the Battle Creek Community Foundation, which has a particularly robust college scholarship program. Currently, I volunteer as a grant committee member with the Marshall Community Foundation. Four times a year we review grants and make decisions on where the money goes. I believe in the concept of community foundations, because I like the idea of everyone's money comingling and growing over the decades, doing incredible good for the residents. It's collective action.

So give to your local community foundation. If you work or volunteer with a nonprofit, check out your local community foundation's grant programs. If you're a college student or the parent of one, check out their college scholarship programs. (Find your Community Foundation here: <http://www.cof.org/community-foundation-locator>.) Their motto is "for good, for ever" and they belong to you and your community.

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back to top

## Mark your calendar for the 24th Annual ORS Golf Outing

It's time to sign up for this year's ORS Golf Outing. Here are the details:

- Thursday, August 14th
- 10:00 a.m. shotgun start
- Centennial Acres Golf Course (Sunfield)
- \$42/person (\$168 per foursome) Cost includes 18 holes of golf with a cart, free driving range, hot dog lunch, a full dinner after the outing, and lots of great golf prizes and door prizes.



Pick your foursome, give yourselves a name and choose a team captain. The event is open to everyone at ORS, our business partners, family, and friends. It's not an officially sanctioned ORS event, so make sure you request appropriate leave from your supervisor.

If you have questions, contact a member of the planning team: **Fred Covert, Andy Kolp, Doug Murray, or Travis Peake**. Details of how to register and when payment is due will be coming soon.

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back to top

## Detroit's Eastern Market Flower Day

If you didn't attend this year, you might want to make sure you attend next year. It's the event flower lovers anticipate each year—the Eastern Market Flower Day. This year's event, held on May 18, was the 48th gathering of flower growers from Michigan, Canada, and other nearby states, displaying all kinds of trees, shrubbery, perennials, trees, and tropical plants which were available for purchase.



Each year over 200,000 visitors, with little red wagons in tow, cover the 15-acre area looking for the perfect flowers to spruce up their yards. While plants and flowers are clearly the main attraction at this event, there's much more going on at Eastern Market, the largest public market district in the United States. From fruits and veggies, meats and baked goods, and artisan food vendors to food trucks, you can find it all here.

Flower Day may be the market's biggest event, but the market is open all year round. Attending a Saturday Tigers game? If you come a little early, here's a pictures of what you'll see at the market.



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[back to top](#)

### Comings



**Rachel Nurenberg** started on May 19th as a student in CE. Rachel is from Pewamo, MI and lives in East Lansing where she recently graduated from MSU with a degree in Family Community Services. This fall Rachel will be attending the U of M in pursuit of a Master's degree in Social Work. She was previously an intern for Ele's Place and a member of the MSU marching band, and she enjoys running, softball, watching MSU football, and The Bachelorette.

**Loren Greeley**, a former ORS employee, joined the PS team on April 28th. Loren is currently attending The University of Phoenix for Health Administration. She is from Grand Ledge, but is currently living in Lansing where she enjoys spending time with her four children.





**John Karagoulis** joined ER on May 27th as a data analyst. Prior to joining ORS, John worked as an Economic Analyst with Labor Market Information in Detroit. He graduated from MSU with a degree in Economics. He has been happily married for three years, loves playing tennis regardless of the weather, and also loves making his own yogurt.

**Jon Slaughter** joined ORS as a Business Process Analyst in Process Support on May 2nd. Jon's previous roles include Operations Manager and Financial Analyst. He earned a Bachelor's degree in Industrial Psychology at Lawrence Technological University and an MBA at University of Phoenix. Away from work, Jon loves to golf!



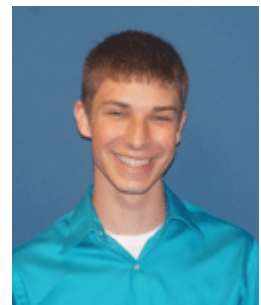
**Adrienne Thelen** is a familiar face here at ORS. She came back on May 5th for her 3rd summer as a student in CS. Adrienne is from Portland, MI and is studying Social Studies and English Secondary Education at Michigan State University. She enjoys watching sports, especially the Tigers and the Spartans. Her hobbies include reading, sports, and following boy bands across the country.

**David Pastula** joined ORS as a student in CS on May 5th. David has experience as a Student Site Coordinator for Michigan Science Olympiad and as a Rankings Coordinator for the International Quidditch Association. David is from St. Johns and is a Physics Education senior at MSU, where he is a member of the Spartan Marching Band and the Quidditch Team. David likes cats and event planning.



**Catie Chin** also joined CS as a student on May 5th. Catie lives in Eaton Rapids with her grandparents and is working toward a degree in Special Education at Olivet College. In her free time, Catie enjoys cheerleading, running, babysitting, and cats, although she has six dogs; one toy fox terrier and five Chihuahuas.

Student **Kaleb Lenneman** joined the CS team on May 12th. Kaleb is from Westphalia, and currently attends CMU for Vocal Music. He has an older brother and an older sister, along with two cats and a Siberian husky. Away from ORS, Kaleb enjoys singing, reading, and general tomfoolery.



### Goings

ER wishes the best to **Nicole VanVleck**, who accepted a position with DTMB Technical Services where she will be the Administrative Assistant to the director of Technical Services. Her last day is June 6th.

[back to top](#)

# STAFF TRAINING

On May 28 and 29, **Ryan Nevins** attended a two-day training offered by Civil Service titled *Crucial Conversations*. This training helps attendees master their crucial conversations to improve their organization, strengthen their relationships, and improve their overall health.

On May 28, **Wayne Aldrich, Dustin Duprest, Robert Grescowle, Kara Gross, Meg Leonard, Marla Milton, Kristine Morris, Dan Norberg, Carolyn Parkinson, John Schiller, Tim Simpson, and Don Williams** completed *Microsoft Visio 2013 Part 1* training as a follow-up to their *Process Mapping Analysis* training.

[back to top](#)

## Congratulations to our graduates!

Some very special people in the lives of ORS staff graduated this spring and are moving on to new horizons. Details for each graduate can be found by clicking on an individual's photo on the refrigerator below.

Click on the image  
to enlarge the picture



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

The *LookOut* is  
published by the



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[back to top](#)

Office of Retirement  
Services,  
Department of Technology,  
Management and Budget,  
State of Michigan

Director:  
Phil Stoddard  
Edited by Customer  
Education

Thanks for reading!!



## Local area activities and events

### 19th Annual BWL Chili Cook-off—Downtown Lansing

Tonight, Friday, May 30, 2014 from 5:30pm to 9:00pm

The 19th Annual Chili Cook-off promises to be the best and largest yet! In addition to the Heated Chili Cook-off Competition, attendees can enjoy the family fun picnic area, watch the 2nd Annual BWL-Olympic Broil Chili-Dog Eating Competition, listen to the live music, and watch the Duck Derby Race. Details at <http://www.lbwl.com/cco/>.

### Lansing Mayor's Family Riverwalk—Lansing

Saturday June 07, 2014, from 8:30AM - 12:00PM

Join Mayor Virg Bernero on a 3 mile walk that starts at Potter Park Zoo and ends at Turner Dodge House. The first 1000 walkers receive a t-shirt! Registration begins at 8:30am. Walk begins at 9:00 a.m. Enjoy the River Trail while getting fit! Enter to win fabulous prizes. Details at:

<http://www.lansingmi.gov/event/view/06/07/2014/2179#961>.

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[back to top](#)

**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.