



# LookOut

June 30, 2000

Volume 3, Issue 24

**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

Independence Day ----- 4th  
All-Staff Meeting ----- 13th  
State Police  
Board Meeting ----- 20th  
ORS Picnic ----- 21st  
Pension Paydate ----- 25th

### August

DMB Celebration ----- 2nd  
Public School Employees  
Board Meeting ----- 3rd  
State Employees Board  
Meeting ----- 10th

### September

Labor Day Holiday ----- 4th

## CNEX marketing research results unveiled

Team #2 - Establish Methods to Assess Customer Needs and Expectations (CNEX)

Team Members: **Andy Daignault, George Urban, William St. Amour, and Sam Williams**

Team Sponsor: **Laurie Hill**

The CNEX Team was formed to determine the needs and expectations of ORS customers. The overall focus and intent of this survey project is quite different from the traditional satisfaction surveys we have been conducting in the past several years. This marketing research study was directed towards learning what our customers viewed as their needs and expectations, then prioritizing them in relation to the retirement services we currently offer, along with other services we may need to add to meet

our customers' needs and expectations.

The six month project, now approaching its final phase, recently unveiled the results of a comprehensive market research study to the ORS Leadership Team and Triads. The information learned from the market research study will provide ORS with the opportunity to accurately align current services so they will meet or exceed the customers' expectations, and collect information for the Vision ORS project, which is focused on developing processes and systems that are results oriented.

Based on the results of the market research study, employers have a greater sense of urgency in receiving ORS communications than either of

*See Strategic Team update on page 2*

## Data Purity Team focuses on Detroit evaluations

A special Detroit Data Purity Team is working on a project to evaluate service credit data for a group of Detroit public school employees who served under the former Detroit Public School Employees Retirement System. Prior to 1980, public school employees in Detroit were members of a separate retirement system under the control of the Detroit Board of Education. In 1980, Public Act 300 of 1980, as amended, brought together **all** of the state's public school employees under the Michi-

gan Public School Employees Retirement System.

Since that consolidation, considerable effort has been put forth to merge the reporting formats from the two systems, yet still retain some of the reporting differences for years prior to 1980. However, most long-term Detroit members still look to the Detroit Board of Education for their retirement direction, with little or no communication with ORS until they prepare to retire.

*See Detroit Purity Project on Page 5*

### Strategic Team update

*Continued from Page 1*

the other population segments. For employers, the telephone is the preferred communication method to and from ORS, with e-mail a close second choice. The actives and retirees preferred to contact ORS by telephone and receive communication from ORS by mail.

The majority of the employers expect a response in 48 hours while the actives and retirees are willing to wait 3 to 5 days for their response. All populations agreed the best time for ORS to communicate with a customer is within five years of the planned retirement.

The market research study created a priority action item list of customers' needs and expectations for Vision ORS. The priority action item list pro-

duced a Critical, High Priority and Priority Customer Needs and Expectations ranking. This study isolated critical customer needs and expectations, which were defined as those items significantly important to all three populations or to one target population of interest. The critical needs and expectations identified were:

- Information about the Retirement System available from a retirement information representative at a 1-800 number
- Consistent and accurate information regardless of the source
- Printed information packets about the Retirement System available as an alternative to the web site information
- Treated with courtesy when contacting the Retirement System, especially for retirees
- Benefit estimate available

from an automated 1-800 number (primarily active population issue)

- Pension checks arrive on time (primarily a retiree issue)
- New employees pamphlet about retirement benefits given to all new employees (primarily an employer issue)

The project contractors presented the results to the Triads on June 21. The Triads can now share with the SMEs what was learned from the research study. The CNEX team plans to present the results of the study to the entire ORS staff at the All-Staff Meeting on July 13.

The next step for the CNEX team is to conduct a post-market research study in partnership with the contractors, which will provide the opportunity to explore highlights, unusual findings or responses, and new directional information that will bring value to Vision ORS. The post-study is scheduled for completion in July 2000.

### Reminder: Record your holiday time in DCDS

Next week you'll receive 8.0 hours of holiday pay for the 4th of July holiday. If you're on an alternate work schedule, you need to make an adjustment on your DCDS timesheet to have it properly reflect your work hours and holiday hours.

To record your holiday hours, you must make a new row on the Time schedule portion of the Data Collection option. On the left side of the time schedule, under the Hours Type column, mouse click in a blank cell and press the

letter H four times. HOL1 should appear in the cell.

Move across the row, under the July 4 date, and enter in 8.0 for your holiday hours.



Remove the hours from the REG1 row under July 1. If you

are normally scheduled to work more than 8.0 hours for that day, you will need to enter the appropriate amount of annual leave time in the ANLV row for the difference between your scheduled hours and the 8.0 of holiday pay.



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## Vision ORS moves into next phase of the project



### KEY DATES

July 10 ..... CBSI arrives; Steps 2, 3 & 4 begin  
 July 13 ..... All staff meeting; CBSI introduction  
 October ..... Step 2 (As Is) completed  
 October ..... Step 3 (Best In Class) completed  
 January ..... Step 4 (To Be) completed

### Vision ORS Project Update

An expansion of activities with Vision ORS has already begun to occur with the selection in mid-June of Complete Business Solutions, Inc. (CBSI) as our vendor. CBSI will be assisting the Vision ORS Team with the next three steps of the project, As Is, Best in Class, and To Be.

“We want to keep staff informed of the progress being made as ORS proceeds with this project, so we will be using regular articles in the *LookOut* to provide periodic updates,” states ORS Director, **Chris DeRose**.

This past month, the Vision ORS Team met with some of the primary team members from CBSI to give them an introduction to ORS. They will be on-site at ORS beginning July 10.

Several focus group sessions were conducted to assess ORS’s readiness to begin Step 2, “As-Is.” These assessments centered on the areas of people, process, and technology. **Clif Rhodes** conducted the “People” assessment; **Joanne Busley** and **Ray Smith** conducted the “Process” assessment; and **Jerry Vinyard**, with assistance from **Deb Mosher**, conducted the “Technology” assessment.

The assessments generated from these focus group interviews were key to a June 26 Go/No Go decision. Based on the results, it was determined that ORS has completed the preliminary preparations needed to proceed with Steps 2, 3, and 4, as defined. A few areas of caution were identified that are manageable, but no major

concern arose that would prevent ORS from moving forward as planned. Therefore, on June 26, the determination was made to proceed with the project.

### Meet the Vision ORS Team

To help you get to know the Vision ORS Team, we’ve compiled the following personal bios for some of the newest on-site team-members, **Steve Hawley**, **Gerry Kirk**, **Tami Rozovics**, **Ram Sastry**, **Rolly Tolly**, and **Jerry Vinyard**. They will be working with Vision ORS Project Manager, **John Frederick**, and ORS team members, **Joanne Busley**, **Lisa Naccarato**, **Bob Nemeth**, and consultants, **Clif Rhodes** and **Ray Smith**. Additional staff from CBSI may also be assisting along the way, as needed. Look for their bios and photos in future issues of the *LookOut*.

#### Steve Hawley, CBSI Project Manager



Steve Hawley

Steve Hawley’s role will be to ensure that the project meets the expectations of ORS, in quality, timing, and deliverables. His responsibilities include: managing the executive relationship with ORS, providing project management guidance, supplying skilled resources to the project, resolution

of project-related issues, and participating in regular executive project management reviews.

Steve has over 20 years experience in the public retirement industry, working in an executive capacity alongside Executive Directors and other public retirement executives. He has provided consulting services to retirement system executives in the areas of business strategy definition, information technology planning, and developing long-term strategies to respond to industry challenges. Steve also brings a significant amount of project management skills to the team that will be leveraged in the form of quality assurance reviews and executive-level oversight of the project.

When he isn’t working, you’ll find Steve sinking balls...either on the golf course or on the billiard table.

*Continued on Page 4*

## **Vision ORS Team (Continued)**

### **Gerry Kirk, Deputy Project Manager (CBSI)**



*Gerry Kirk*

Gerry Kirk's role will be coordination of all elements of the project, along with delivery of CBSI and subcontractor services. Specific responsibilities include: project scope setting and planning; ensuring deliverables are well understood, integrated, and meet ORS expectations; managing the project to the workplan; addressing major project issues; overall quality assurance; and reporting status to the project management team.

Gerry has over 30 years experience in the IT industry encompassing project management, strategic planning, business process reengineering, organizational change management, customer relationship management, improvement through e-business technologies, and benchmarking.

Like Steve, Gerry says he also likes sinking balls... a CBSI trait? Additional interests are rollerblading, kayaking, photography, and travel.

### **Rolly Tolly, Integration Manager (CBSI)**



*Rolly Tolly*

Rolly's role is to integrate the people, process, and technology project deliverables into a final project report. This report will link these deliverables to the Vision ORS project Steps 5, 6, and 7 – Design, Build, and Implement. His responsibilities include development of the final Executive Summary Report; coordinating deliverable production and status reporting; maintaining the infrastructure for the project, the project plans, issue tracking, and project metrics.

Rolly has over 18 years of IT experience, with a focus on Process and Systems Integration. His experience includes over seven years of Public Sector and State of Michigan experience. His expertise lies in the areas of project management, development of detailed implementation plans, and preparing business cases.

Rolly spends his spare time with his family and participating in Scouting activities.

### **Ram Sastry, Technology Leader (CBSI)**



*Ram Sastry*

Ram Sastry, together with Jerry Vinyard, will lead the Technology team in the assessment and design of IT architecture/systems. Ram and the Technology team are specifically responsible for assessing current ORS systems and architectures; providing ORS with best technology practices; defining a Technology Vision that will support the new "To Be" business process model; and defining a follow-up implementation plan, by working collaboratively with other Vision ORS project members.

Ram has more than 10 years of experience in defining large system architectures that are client/server web-based and use object-oriented technologies. Recently, Ram worked as an architect in developing the Technology Vision for the State Teachers Retirement System of Ohio (STRS).

Ram enjoys his off-work time with his family, reading, and watching movies. He points out that he also regularly exercises, but this is more a fitness requirement than fun activity.

### **Jerry Vinyard, Technology Leader (ORS)**



*Jerry Vinyard*

Jerry Vinyard, working with Ram Sastry, will oversee the collection and documentation of information on the existing technology, data, and applications that support ORS's current business processes. Jerry and Ram will be guiding the selection, design, construction, and implementation of the technology and software that will be used to support the new business processes of ORS.

Jerry brings with him considerable executive management experience with large-scale information technology projects. He directed the development and implementation of a major statewide client server system to register and title motor vehicles, and was involved in two major efforts to achieve Year 2000 compliance for software programs, desktop hardware, and networks, main-frame hardware and software, and infrastructure imbedded microprocessors.

### **Vision ORS Team (Continued)**

Although Jerry spends a lot of his free time on airplanes or in airports, being a consultant, when he does have some spare time, he enjoys playing racquetball, riding motorcycles, puttering around his house and garage, and relaxing with his dogs or watching movies. Jerry has been trying to figure out how he can use up his frequent flyer miles, so he may be open to some suggestions when you see him.

#### **Tami Rozovics, People Leader (ORS)**

Tami Rozovics, with assistance from Clif Rhodes, will lead the collection of people-related data and will develop the future requirements for people

needs. Tami will also be assisting **Deb Gearhart** with people development.



*Tami Rozovics*

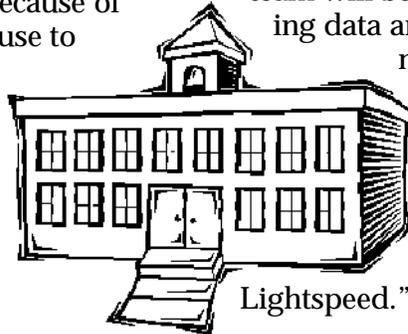
Tami has over 15 years of consulting experience with expertise in the areas of Project Management as well as Training – Systems Thinking, Team Learning, Personal Mastery, Mental Models, Shared Vision, and Process Modeling.

Tami enjoys ballet, yoga, and working with groups to develop awareness of Basic Systems Thinking concepts through a simulation called *Friday Night at ER*.

### **Detroit Purity Project**

*Continued from Page 1*

When retirement time comes, their retirement process is hectic and cumbersome because of the various formats ORS staff must use to create a combined work history and evaluation. To avoid these problems at retirement, ORS has taken a pro-active approach to evaluating the older data for 4,928 Detroit area members – those most likely to retire in the next few years.



since April 1997, and is extremely knowledgeable about the Detroit evaluation process.

Sandy comments on the direction she and her team will be pursuing. “We will not be soliciting data and/or applications from these members, nor from the Detroit

Board of Education. Instead, we will be reviewing member records from the Microfilm Area, microfilm reels in Records, and the Public School Employees database on

Lightspeed.”

In the late 1980s, the Public School Employees Retirement System undertook a Data Purification evaluation project that involved a review of work history for a group of outstate (non-Detroit area) public school employees. Staff reviewed data for members who met certain age and service requirements to ensure more accurate system data and provide the member with cumulative years of service information. The end result was an easier retirement application process and a system that was ready for the reengineering effort in 1997. This current Detroit Data Purity project will provide this same service for the Detroit public school employees.

“This project began on June 19, 2000,” Sandy reported, “and is expected to continue into the fall. The goal is to complete the project prior to the issuance of the annual Member’s Statement of Account. We have five temporary employees working on the project: **Sean Evans, Michele Johnson, Aaron Ludwiczak, Joseph Lynn, and Rachel Ray**. They are located in the training area between ORS Conference Rooms N and M.

**Sandy Elstro** from Active Accounts, is the Project Lead, under the direction of **Andy Daignault**, the BPO for Service Credit Evaluations – Process 530. Sandy has been with ORS

Both ORS and the members will receive a number of benefits from this project. These members’ annual Statement of Account will list cumulative service credit totals. The CIC representatives will be able to confidently inform Detroit members of their years of service totals. And when these members apply for retirement, Claims Processing will be able to process their retirement applications more rapidly.

## Consolidation effort helps reduce number of forms

ORS staff members handle a variety of different forms, for all types of purposes. Currently we have identified over 300 numbered forms in use, in addition to form letters and other specialty use forms that were never numbered.

Although we've added quite a few new forms to the list in the past year or two, the Communications Unit staff is always on the lookout for opportunities to consolidate similar forms from our different retirement systems into a single form which can be used by multiple systems. One of the latest examples of this effort is a new *Insurance Change Request* form (R452X) that took the place of separate change request forms for the Public School Employees system and the State Employees system. The new form can be used by retirees from any one of the four retirement systems to change insurance coverage.

In the past year or so, some of the forms we consolidated

include the *Pension Recipients Federal Income Tax Withholding Authorization* (R12X), the *Electronic Funds Transfer (EFT) Application* form (R277X), *ORS Death Notification* (R395X), and a number of disability retirement forms.

More forms are very likely to be consolidated in the future, thanks to a new forms review process recently implemented by the Communications Unit. Each existing form has been assigned an annual review date.

Each month, Communications Unit Student Assistant, **Marisa Nedock**, circulates copies of the forms scheduled for review that month. Business Process Owners (BPOs) and/or Subject Matter Experts (SMEs) look over the forms for any necessary updates, and assess if any of those forms could be combined with another form from the same system, or consolidated with a similar form for one or more of the other systems.

Along the way, forms are revised to reflect a similar "look and feel" and reflect the ORS address and phone numbers. Although we still have a ways to go, thanks to the efforts of the Communications Unit staff, **Rosemary Baker, Matt Beha, Robert Glennon**, and Marisa, and special assistance from **Janet Graham** from Finance and Administration, we are beginning to see a more uniform ORS image being presented to our customers.

### Thought for the Day

Nothing in the world can take the place of persistence. Talent will not; nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated failures. Persistence and determination alone are omnipotent.

— Calvin Coolidge

## Take a deep breath, relax, and solve this week's Scramble.

A few weeks ago, a friend of mine went to see a psychiatrist. He gave the doctor the following explanation of his problem. "Doc, I keep having these alternating recurring dreams. First I'm a teepee; then I'm a wigwam; then I'm a teepee; then I'm a wigwam. It's driving me crazy. What's wrong with me?" The doctor told him, "It's very simple. You're two tents."

We don't want this to happen to you, so take a few minutes to relax and unwind, and work out a solution to this week's scramble.

Eismotsme ti si ton odog nheguo ot od uroy setb;  
Uyo evah ot od shawt dreriuqe.  
- ris nnisotw hcirlluhc

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



Eismotsme ti si ton odog nheguo ot od uroy setb;  
Uyo evah ot od shawt dreriuqe.  
- ris nnisotw hcirlluhc