

NPEA 2007 ROUNDTABLE DISCUSSION:  
(OCTOBER 20, 2007 – OCTOBER 24, 2007)

## **Not Only Member Education – What about staff education and training?**

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### **1. How do you handle training for staff, and what type of training programs have been used either internally or externally?**

- ✓ Require CRC certification (InFRE Organization certificate)
- ✓ Standard Training Books (Iowa – Alyson)
- ✓ Standardize Curriculum
- ✓ Staff Trainer within organization
- ✓ Job Shadowing
- ✓ Required to learn the basics of pension plans (457, 401(k), 401(a), 403(b), etc. – actuary can assist in this training)
- ✓ Have yearly seminars for staff
- ✓ New staff required to sit with phone center to see what kind of calls come in

### **2. What is done to encourage staff to remain informed on changes in the retirement industry?**

- ✓ Articles are passed throughout the agency
- ✓ Use internal staff to find up-to-date articles
- ✓ CAPPP program certificate (Certificate of Achievement in Public Plan Policy)
- ✓ Conduct weekly meetings to discuss issues
- ✓ Cascade the information from managers to supervisors to employees
- ✓ Have a brief done on an issue and send it to staff defining the Do's and Don'ts
- ✓ Newsletter to staff every month

### **3. Do organizations reward staff for obtaining certifications and if so, what rewards?**

- ✓ Money bonuses are issued for certificates, completion of classes, etc.
- ✓ A bump in salary is awarded for completion of college degree or certificate from a place like InFRE
- ✓ Tuition reimbursement

- ✓ Negotiations may be needed in union contracts to give monetary incentives

**4. In high volume, high intensity jobs, what is being done to keep staff motivated?**

- ✓ Keep them informed!
- ✓ Allow casual days
- ✓ FEED THEM!
- ✓ Time off coupons for work projects completed
- ✓ Offer premium pay (1 ½) for certain parts of the job
- ✓ Offer overtime
- ✓ Have predetermined hours allowed for travel time on certain road trips; sometimes you come out ahead and sometimes you don't
- ✓ Allow flex time and flex schedules
- ✓ Find info. on change management issues; specifically on how to deal with difficult employees or departmental differences

**5. What are effective ways to bridge communications within organization's divisions and how can interdepartmental cooperation be improved?**

- ✓ Get departments together to figure out the processes that each of them does; bring no personality issues into it
- ✓ Have an interdepartmental task force to identify issues that cross departments; have interdepartmental input on publications, or processes to help reduce the telephone calls to all departments
- ✓ Have job sharing
- ✓ Have departmental supervisors meet regularly to stay on top of issues
- ✓ Include customer service as part of an individual's performance evaluation, both external and internal
- ✓ Have employees attend personal development seminars
- ✓ Bring in outside vendors for conflict management, if needed
- ✓ Bridge differences by having a representative from each department in other departments' meeting.

\*Be aware of union contracts that may address some of these suggestions.\*