



System Roll Call

October 22-26, 2022 | Seattle Marriott Waterfront Hotel | Seattle, WA



PERK UP

Seattle 2022

2022 System Roll Call

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Retirement Systems of Alabama



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
222,238	158,397	50,653	348	\$52.3B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

RSA Field Services had resumed in-person seminars and agency visits in 2021, initially with half-capacity and required mask use; however, by late 2021 full capacity returned, and masks became optional. All our 2022 outreach efforts thus far have functioned much as they did pre-pandemic. After nearly two years of operating with caution and virtually, demand has soared for our field services representatives to be in the field meeting with members.

While the pandemic took our agency by surprise, our ITS Division was quick to react and make sure each employee had access to the technology they needed to work from home. All RSA divisions have been working almost completely on premises over the past year. The latest struggle has been hiring new employees to fill positions due to retirement and normal turnover. RSA Communications has worked closely with our HR and Benefits Divisions to create a recruitment effort by creating a job fair setup to encourage applicants to get more information. Recruitment information and handouts were created to target those currently in college and close to graduation. HR is in the early process to create relationships with our in-state colleges and universities, including joining on campus job fairs, using Handshake to reach students looking for jobs, and encouraging students to join the RSA as summer interns.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Field Services: Mr. Kit Gallup, Director

Retirement Preparation Seminars partnering with Social Security, State Health Insurance, and Local Government Health Insurance

Early to mid-career Seminars

Agency Seminars/Webinars

RSA on the Move at agencies and school districts (In-Service Days, Benefit Fairs, Staff Meetings, etc.)

Presentations/Conferences for Deferred Comp, Pension Benefits, Health Insurance, Flexible Spending Accounts

ERS/TRS also offer on-site, phone, and virtual Individual Counseling Appoints

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The 2022 Regular Legislation Session ended on April 7, 2022. The Legislature fully funded the RSA, provided bonuses for retirees, improved Tier II benefits, and improved active members' death benefits.

As it has always done, the Legislature ensured that the RSA was fully funded by setting the actuarially determined employer contribution rate in the budgets. This is one of the most important things to ensure the RSA's continued sustainability and ability to pay promised retirement benefits to its members.

Additionally, the Legislature provided bonuses for ERS State and TRS retirees, who received these payments at the end of April. A direct appropriation funded the TRS bonus, and the ERS bonus will be funded by an increase in the fiscal year 2024 employer contribution rate. ERS retirees from local units may receive the same bonus in October if their local employer elects to provide it.

The Legislature further provided relief to all retirees by providing a \$6,000 state tax exemption for taxable retirement income of retirees aged 65 and above (Act 2022-294). This exemption will include distributions from RSA-1 retirement accounts.

The Legislature improved the retirement benefits for ERS and TRS Tier II members (Act 2022-222 for TRS and Act 2022-351 for ERS). Currently, Tier II members can retire only after reaching retirement age (62 years for regular members and 56 years for members who are firefighters, law enforcement officers, and correctional officers). These Acts allow Tier II members to retire at any age with 30 years of service, subject to a benefit reduction of 2% for every year that the member is below retirement age. There is no member contribution rate increase for this new benefit.

Finally, the Legislature made important changes to death benefits for active members. Act 2022-184 gives surviving spouses of retirement-eligible members that die in active service the same benefit that would have been available if the member had retired and selected the 100% lifetime benefit option. The only requirement is that the spouse must be the sole designated beneficiary on file for that member.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

The RSA interacts with members through standard mailouts, Member Online Services for member self-service, Member Services' call center, as well as social media. We currently use Facebook, Twitter, and LinkedIn. There are two member-run Facebook groups that keep RSA in the loop regarding their posts and member comments. Our goal is to increase our social media presence in the upcoming year with more frequent posts and member interaction. We do not provide web counseling, but instead provide counseling by phone.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

As of October, Multi Factor Authentication has been added to our member self-service program. Also, we are in the beginning stages of updating the software for our deferred compensation plan. For our deferred compensation plan, we are also in the process of increasing our enrollment efforts. We have created a new informational brochure along with ads for use on social media, our website, and our monthly member newsletter.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

How to better target members for virtual education opportunities.



Alaska Department of Administration DIVISION OF RETIREMENT AND BENEFITS



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
83,676	46,291	35,767	112 filled of 132 possible	\$38.8 B

Section 1: **Post Pandemic Impact** – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Our return to office has been rough. We have supporters of the traditional employer/employee models who refuse to look at the actual benefits of remote working and we also have those that are completely all in for a new work culture and have embraced the remote work culture/movement. As a group, we have many teams that can successfully integrate a remote office culture and we also have groups that have demonstrated that it is not feasible and need to be in an office setting to maintain our metrics. We have learned that not everyone can remote work and we don't need everyone in the office to be successful. What is important is a solid understanding of what makes a group/team successful. Empowering all stake holders to express opportunities for success and to raise concerns for ongoing or potential failures are some major considerations. Some examples of practices that lead to success are daily check-in and check-out, weekly group meetings, auto surveys for counseling and seminars, phone tracking and communication logs.

Section 2: **Member Education** – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We provide a full array of education opportunities ranging from individual appointments, webinars, live seminars, and prerecorded videos (Youtube channel [\(78\) Alaska Division of Retirement and Benefits - YouTube](#)). We also partner with our TPA Empower Retirement, the SSA and our Medicare Office for comprehensive educational opportunities.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

For 2022 we have implemented the in-service distribution option for Deferred Compensation Members for those who are age 59 ½ and older. This allows for our members a better tool to transition into retirement as our Defined Contribution accounts 401 (a)s are more restrictive (60 access after termination-no in-service).

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Today, we utilize Interactive Client for our Members Service Center and for our Counseling Team. This allows us to track our customer service metrics and documented counseling communications. For online counseling, we utilize MS Teams for its ability to record and play prerecorded presentations. For online recordings, we utilize Camtasia (upgraded version) & Screencast and post on our Youtube channel. We do have FB and Twitter...however, those are only used by upper management and not for current events or communications.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

Nothing new. Just keeping adjusting and tweaking our education and communications.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

I would like to know: "What are the estimated environmental benefits for those who have embraced remote work? Road damage, gas, tires, oil, paper (remote work is now 99% paperless), accidents, insurance (less on the road), laundry (dry cleaning), less people calling in sick (because at home sick workers still work)....

This would be a good study for carbon offset credits.



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
As of 6/30/2021 212,088	165,747	247,235	211	\$50.6 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Success:

During the pandemic the Arizona State Retirement System (ASRS) operated with close to 80% of staff able to telework. Since that time, the ASRS has determined that staff flexibility has had significant positive impact on morale with continued excellence in job productivity. In March 2022 the ASRS established a “New Normal” and has maintained a workforce of which approximately 75% telework. Many departments, while still allowing telework, have opted for partial time in the office. For example, some teams may be asked to come into the office one day a week, where other teams may meet once a month, and others, as it makes sense. The Financial Service’s Division, for example, will have all of its supervisors in the office as a “retreat”. This will be used as time for team building and brainstorming. We have been able to leverage flexibility to accommodate business needs and staff engagement.

Lessons Learned:

Although many of the staff enjoy working from home, we have found that there is value spending time with our co-workers in person. As mentioned in the successes, the agency has found that some things are best done in person, especially such missions as brainstorming or simply socialization.

Challenges:

Because the agency was able to allow so many of our staff to telework during the pandemic, we have found that it is sometimes best, for business purposed to have staff onsite. This has been discouraging for some, who would prefer to work solely from home, but some job responsibilities are best suited in the office. An example is our imaging team. During the pandemic we were able to send 75 percent of the team home; however, it was a challenge when the few onsite staff were out unexpectedly. And quality control was also more challenging.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Success:

The ASRS originally had a yearly mailing, *Financial Horizons* newsletter that was targeted to both the Active, Retired and Inactive members (a total mailing of more than 500,000). It was discovered that the mailing was lost on the inactive group and often repetitive for retired members, who received regular e-newsletters. In February 2022, the ASRS created a specific message geared to 200k inactive members on a post card; it was meant to be short and direct, letting members know they have funds on account. Due to this mailing we were able to increase missing member information, such as email addresses, as well as educate and inform this population regarding their disbursement options.

Lessons Learned:

This population was very responsive, over 12k calls were received and over 25k accounts were accessed online. This increase, although positive overall, was a hardship in the sense that our Members Services contact teams were inundated with calls and inquiries that took longer due to missing data and our need to ensure data security. Our lesson learned is to re-examine when and how often to send this mailing. For example, instead of mailing the entire inactive population per month, we could send the post cards the month of the inactive member's date of birth. (Active and Retired members receive a birthday email, which has been a popular and positive endeavor.)

Challenges:

Because the postcard mailing was so effective, our processing teams saw an increase in refunds, retirements and service audits.

Other Member-Employer Education:

The formatting of the 2022 employer's conferences was changed based on specific feedback from our employer partners in 2021. Historically our employer meetings had a specific agenda for everyone. We learned from our employer participants that many of the topics didn't pertain to their specific jobs. This year we set up the conference with two hours of specific information for all employers, and multiple breakout sessions for individuals to attend: Long Term Disability, 457 Plan, Contribution Accounting, Health Insurance Premium Benefit processing and a Q&A.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

CPP (Contribution Pre-Payment Program): <https://www.azasrs.gov/content/contribution-prepayment-program>
This unique program allows employers to prepay a lump sum amount that can be used to offset their portion of the pension plan contributions. It was designed and implemented in the fall after a number of employer requests due to some holding large amounts of cash that was earning little interest.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

The ASRS continues to develop and enhance internally developed technology resources to focus on improving our customer service with members and employers leading to enhanced efficiency, accuracy and turnaround times for our production environments, as well as prioritize security enhancements to protect sensitive information.

Section 5: New Initiatives – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

CPP (Contribution Prepayment Program); reengaging with our inactive members; and moving to Non-Medicare Self Insurance.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

How **Health Insurance premium benefits** are managed and applied to member accounts or remitted to the employer?

If changes are needed at your retirement system/plan, such as website design, tax form processing etc.; does your plan bring it **in house**, do you **outsource**, or is it a combination of the two?

W4p Tax form - ASRS made changes on their public website as well as internal database changes. What did you do to prepare? Who already shifted to the new process in 2022, who is making changes in 2023, who hasn't gotten started yet?

How are you **managing security changes** as it relates to PII (Personal Indefinable Information)?

-Do you still require SSNs? If so, where? Forms, in the database, incoming files?

How are other plans **keeping their staff engaged** if still at home, how do you handle virtual learning? What has worked for you? Has your turn over changed during the pandemic and then post pandemic?



San Mateo County Employees' Retirement Association



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
4,603 General 646 Safety	4,784 General 995 Safety	2,224	23	\$5.65 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

SamCERA reopened its office to the public on June 15, 2021 with limited staff working onsite. In October 2021, all remaining staff returned to the office, and most are now working a hybrid/flexible schedule.

We have had no interruption to services since the start of the pandemic, and we've found ways to make adjustments and changes to improve and streamline business processes. For example, we are now offering all financial planning classes and seminars virtually, which has significantly increased the number of members we are able to offer these services to.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

SamCERA's member education program utilizes a variety of communication channels and methods to make information easily accessible, available, and easy to understand for everyone. Our current member education program includes the following:

- **Financial Planning Classes** – Financial planning classes are offered to all members and their spouses/partners to provide an opportunity for them to learn skills needed to achieve financial well-being in retirement. These classes are offered through a conflict-free vendor, and there is no cost to the member. Classes include Retirement Planning for All Ages, Estate Planning, Organizing and Managing Your Finances, etc. All classes are currently being offered as online webcasts.
- **New Hires** – An informational retirement packet is provided to all new hires, and SamCERA staff participate in employer-hosted virtual new hire orientations.
- **Events** – SamCERA staff participate in employer-hosted annual benefits fairs. The County of San Mateo benefits fair was held virtually in 2020 and 2021, and in 2022 it will have both in-person and virtual offerings.
- **1:1 Counseling Sessions** – Personalized one-on-one counseling sessions are currently being offered in-person and virtually via MS Teams.
- **Website** – www.samcera.org was redesigned in 2017 to make it easier for members to find information, retirement resources and reports. The Announcements and Latest News sections allows us to highlight important information for members.
- **MySamCERA Web Portal & App** – The MySamCERA self-service portal and app allow members to access their retirement account information, including communications and publications, in a way that suits their lifestyle.
- **Workshops and Seminars** – The “Ready to Retire” workshop and the “Road to Retirement” seminar are offered throughout the year. The workshop is customized for members that are eligible to retire and plan to retire within 1-2 years. The seminar is available to anyone with at least five years of service and provides an opportunity for them to learn more about the plan. The workshops and seminars cover topics such as: retirement options, employment after retirement, social security, health coverage, deferred compensation, leaving employment, divorce, and more. Since we began offering these seminars online, we have been able to accommodate and reach more members.
- **Newsletter** – The SamCERA Times is a newsletter with two editions, one specifically for retirees and beneficiaries, and the other edition focuses on active members. Producing two editions allows us to provide customized messaging, education and information which will connect with the reader. The retiree and beneficiary edition is available in electronic and printed formats.
- **Brochures, Guides and Forms** – Several resources are available in electronic and printed formats to provide detailed information to members about their retirement benefits.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

On February 25, 2022, Governor Gavin Newsom issued Executive Order N-4-22 to phase out provisions of COVID-19 related executive orders. This executive order stated that specified provisions from previous orders made to respond to the pandemic will expire after March 31, 2022. As a result, the post-retirement employment requirements for retired annuitants resumed April 1, 2022.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired.

Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Besides the traditional methods of communications (in person, phone, mail, and email), SamCERA staff uses the self-service portal, MySamCERA, to provide information and correspondence to members. MySamCERA allows members to access their retirement benefits either on a computer (www.mysamcera.org) or on their phone with our mobile app.

Through MySamCERA, active and inactive deferred members are able to:

- Check account and plan information
- Run a retirement estimate
- Print a current member statement
- Update contact information
- Review documents and upload new documents
- View beneficiaries
- Send and receive secure messages with SamCERA staff

Retired members can use MySamCERA to:

- Print and view current and past Benefit Statements
- Print and view current and past IRS Form 1099s
- View deductions and change withholding information along with certain other deductions
- Generate a Pension Income Verification Letter
- Update certain beneficiary information
- Update contact information
- Review documents and upload new documents

Financial education opportunities are also available online, via webinars. Retirement seminars have been made available on MS Teams, and Retirement Analysts are also able to conduct one-on-one virtual appointments on MS Teams.

To make our services and programs more accessible to our membership, we are exploring video and other media outlets to communicate with members. We posted a retirement seminar video to our YouTube channel earlier this year, created a video page on our website, and we plan to produce more informational and instructional videos in the near future.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

- Before the end of the year, a new member portal will be launched, and we will begin working on an update to www.samcera.org.
- A video and audio upgrade project will update our Board meeting room with new equipment which will support hybrid meetings.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

SamCERA is always open to how other systems are utilizing different communication platforms to educate and engage their membership.



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
207,269	132,111	310,201	304	\$72.6B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

The majority of PERA staff had been working from home full-time between March 2020 and June 2021 during the pandemic. In July 2021, staff returned to the office in a hybrid fashion with most employees being able to work from home up to two days each week.

As of the summer of 2022, based on the workforce needs, role, and type of work performed, each division may request staff be allowed to work from home beyond the baseline model of two days each week. Benefits staff are working in the office at least three days each week, while the communications staff are in the office two days each week. Call center operations were not impacted significantly with return to the office. Our hybrid model was in place allowing the agents to take advantage of both work and home and in-office energy. New agent training and hiring was pivoted back to in-person which allows for a more dynamic training experience.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Since the pandemic, we have been conducting our group meetings via webinars. The Member Education team has researched and implemented best practices for virtual education resulting in no difference in member satisfaction between virtual and in-person offerings. We also have robust direct-to-member email marketing designed to pair our members with the appropriate career-stage educational offering. We have all live webinars available in an on-demand version. With the return to office in July 2021, we offer 1-on-1 counseling both in-person at our offices or virtually over Zoom. In addition to the above, the Communications division utilizes videos, segmented life/career stage emails, and Facebook live presentations. Post-pandemic additions are Facebook Live and webinars on-demand.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

During the 2022 legislative session, three bills were passed by the Colorado General Assembly and signed into law that will have a material effect on Colorado PERA, and these are described below.

HB22-1029: Compensatory Direct Distribution To PERA

The bill required a payment to PERA from the PERA Payment Cash Fund for \$380 million. This amount reflects the suspended direct distribution payment to PERA of \$225 million from July 1, 2020, plus \$155 million in order to reduce two future direct distributions. The future direct distribution payments will be reduced based on the interest that accrues from the initial \$380 million payment as follows:

- for FY 2023-24 (July 1, 2023), the payment is reduced by an amount between \$155 million to \$190 million, resulting in a direct distribution payment amount between \$35 million to \$70 million; and
- for FY 2024-25 (July 1, 2024), the payment is reduced by up to \$27.55 million, resulting in a direct distribution payment of no less than \$197.45 million, unless the actual rate of return is zero or less, in which case there may be no reduction.

Based on this legislation and the known total fund investment return for 2021 of 16.1%, the July 1, 2023, direct distribution will be reduced by \$190 million, resulting in a payment of \$35 million, and the July 1, 2024, direct distribution will be reduced by an amount yet to be determined, but not greater than \$27.55 million, resulting in a payment of not less than \$197.45 million, to be reflected in PERA's audited financial statements for the year ended December 31, 2024.

HB22-1057: PERA Employment After Teacher Retirement

Under current law, PERA retirees are limited in how many days they can work for a PERA employer after retirement without reducing their benefits. This bill temporarily waives those limits for qualified service retirees working as substitute teachers in any school district while there are critical substitute teacher shortages.

HB22-1101: PERA Service Retiree Employment in Rural Schools

Under current law, retired teachers, bus drivers, or food service workers in rural districts of the School Division may be rehired and receive a salary without reduction in benefits under certain limitations. These provisions were scheduled to repeal on July 1, 2023, and this bill expanded them to include school nurses and paraprofessionals to those retirees eligible for full-time reemployment, as well as eliminated the scheduled repeal date, thus making the provisions permanent.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Members receive career stage emails about benefits. Members and retirees receive newsletters. Self-service items include on-demand webinars, videos, website benefit information and forms, and a financial wellness library. Social media includes Facebook, Twitter, Instagram, and YouTube. Webinars and 1-on-1 counseling are offered on Zoom.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We are designing version 1.0 of the plan's first eLearning. We have mapped content across five member-interest categories that we hope to develop and load into a learning management system. Those interest categories include: "Where do I get started?", "What's Next?", "Am I on track?", "Can I retire yet?", and "How do I retire?" Content in each section is curated to address the broad question. We also completed a recordkeeper transition for our 401(k), 457, and 401(a) DC plans in December 2021. Additionally, we launched a financial wellness library, an online employer toolkit with shareable monthly content and on-demand webinars in May 2022. We are in the process of developing a mobile app for Q1 2023.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Member engagement, benefits/program marketing, networking/idea-sharing forums/presentations, trending member communications, stakeholder relations, mobile apps, implementing a new pension administration system, benefit administration technology program management, implementation of LEAN/Six Sigma, and call center training and quality.



Public Employee Retirement System of Idaho



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
~73,5563	~51,891	~45,718	~68	~ \$22,448,950,362

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We are 100% returned to the office.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

The pandemic increased our virtual training presence. As we return to face-to-face delivery, we are modifying our materials to align more with life's milestones and age groups.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Idaho legislators added a new member class for teachers and adjusted Return to Work laws.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We communicate with our members via our website, which includes a member portal where they can view balances, adjust beneficiaries, and run retirement scenario calculations. We do not use social media, but are adopting an email push notification campaign solution.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

PERSI's drive to continuously reach for higher standards for the benefit of our membership, coupled with a sense of dedication in fulfilling our role, led our Board and Senior Staff to develop a forward-looking Long-Range Plan. The Long-Range Plan spans three fiscal years, ending June 30, 2024. It builds upon our historical roots and strengths, identifies our ten-year future vision for success, and outlines the continuous improvement priorities that we will be undertaking to bring PERSI closer to realizing the outcomes of our future vision. To stay at the forefront of serving its membership, the PERSI Board and Senior Staff collectively prioritized a focus on the following four areas: 1) prudently upholding our plans' strong financial health, 2) aligning the education and services we offer to the needs and preferences of our active members, retirees and beneficiaries, and employers, 3) developing and supporting our purpose-driven and highly-skilled staff, and 4) adapting our technology infrastructure to safely and securely meet the needs and preferences of our membership.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Member training



2022 Roll Call Submission Illinois Municipal Retirement Fund



Benefits Contact		Title	Phone #	Email Address
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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
172,310	147,134	138,391	210	\$57.7 billion

Section 1: Pandemic Impact – Please describe specific successes, challenges and lessons learned by your system during the COVID-19 pandemic. Is your system making or discussing any long-term changes to daily operations as a result of the pandemic? If so, what are they?

Currently, IMRF allows one remote workday per week for customer facing departments. Visitors and in-person counseling sessions began in June 2022. Reception area and counseling offices were fitted with plexi-glass barriers; mandated that visitors and counselors were face masks; office is cleaned with approved disinfectant after each visitor.

Travel for our Employer Services staff continues to be on-hold. Meetings continue to be virtually for our Horizon Project partners. Our total system replacement plan does incorporate remote capabilities.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups?

In February 2022 it was announced that our customer service model was changing whereas we split responsibilities into Member and Employer teams. Our Member Contact Center is now located in Oak Brook and our Employer Contact Center is in Springfield. The Member Customer Services team consist of Member Contact Center representatives – managed by a Supervisor; Member Education Counselors (3 in Oak Brook and 3 in Springfield); Analysts; Receptionist in Oak Brook and Springfield - managed by Team Leader and Business Solution Analyst – reporting to the Manager. All member activity will occur within this umbrella from presentations/webinars and in-person or virtual counseling sessions.

Our Employer team includes Employer Contact Center representatives – managed by a supervisor; Employer Representatives; Analyst – managed by a Team Leader; Business Solution Analyst – reporting to the Manager.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

- **Public Act 102-0943 (House Bill 4646):** This law provides that each municipality or instrumentality that employs an employee who is an elected trustee should give the elected trustee at least 20 days of paid leave of absence per year to fulfill the trustee duties for their position.
- **Public Act 102-1061 (House Bill 4209):** This law allows active members of the IMRF SLEP fund to transfer up to 10 years of Article 3 police service to their IMRF pension fund in the next 6 months, starting July 1, 2022. It also opens a six-month window to allow active members of an Article 3 police pension fund to transfer IMRF service credit earned in a law enforcement capacity to that Article 3 fund, starting January 1, 2023.
- **Public Act 102-0849 (Senate Bill 3651):** This law creates an exemption for accelerated payments that arise due to workers' compensation payments.
- **Public Act 02-0850 (Senate Bill 3652):** This law aligns the suggested employer resolution to adopt an Early Retirement Incentive with the statutory language regarding limitations on ERI retirees returning to work for an IMRF employer.
- **Public Act 102-0856 (Senate Bill 3778):** This law adds two additional positions to those allowed to transfer service credit from IMRF to SERS. Effective date is January 1, 2023.
- **Public Act 102-0857 (Senate Bill 3785):** This law opens a six-month window allowing active members in an Article 3 fund to transfer certain IMRF public safety service to that Article 3 fund (effective May 13, 2022).

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Horizon Project

Phase 5 began in December 2021. Our go live date was planned for October 2022. This date has now been pushed to end of 1st/beginning of 2nd Quarter 2023. Phase 5.0 of project is complete and Phase 5.1 is scheduled for January/February 2023. Pilot program for our employers and members will begin February/March 2023. Work continues with the data conversion phase and testing of calculations.

Continuing to update training and procedure manuals as needed. Planning has begun for Employer Training rollout (3,000 employers) and Member – adding more video content for ease of use.

Section 5: New Initiatives – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

IMRF's Web-Centric Initiative

A planned, incremental transition toward becoming a more web-centric organization. IMRF will rely more on the web and less on paper to provide customer services to its membership.

Members who do not have access to the Internet will continue to receive paper.

Group	Total	With E-Mail Address	With Active Web Account
Current Actives:	172,397	118,006	77,406
Current Retirees:	136,648	82,221	66,348
Current Inactives:	145,330	53,230	26,719

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Nothing at this time.



Kentucky Public Pensions Authority



KPPA
Kentucky Public Pensions Authority

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Member Education Contact		Title		Phone #		Email Address			
Shauna Miller		Division Director		502-696-8768		Shauna.Miller@kyret.ky.gov			
# Active Members		# Retired Members		# Inactive Members		Staff Size		Assets (\$)	
122,932		124,341		162,809		250		\$21.6 billion	

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

On May 2, 2022, while between 70% and 75% of KPPA staff continued to work from home, in-person counseling appointments resumed in KPPA's Frankfort office. Retirement counseling appointments continue to be handled primarily by telephone and one-on-one virtual appointments.

Effective September 12, 2022, the Kentucky Personnel Cabinet updated its telecommuting policy to require most employees that had been telecommuting either full-time or part-time to work from an Executive Branch office a minimum of three days per week. However, cabinets were allowed to submit exemption requests on behalf of non-public facing departments for which a good justification could be made to allow employees to continue to work remotely full-time.

KPPA submitted exemption requests for nine qualifying departments, and all nine were approved. The departments are: Enterprise and Technology Services; Employer Reporting, Compliance and Education; Membership Support; Internal Audit; Procurement; Accounting; Communications; Investments; and Quality Assurance. The exemptions grant employees in those departments the flexibility to continue to work remotely five days per week with the approval of their supervisor. The remaining divisions are working in the KPPA office three days a week: Executive; Legal Services; Member Services; Retiree Services; Disability and Survivor Benefits; Retiree Health Care; Procurement and Office Services; and Human Resources.

According to the Personnel Cabinet, 91% of state government employees are now working in the office three days per week or more.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Due to the pandemic and a staffing reorganization we have relied heavily on archived informational webinars posted on our website. These webinar topics include: General Information, Ready to Retire, Tier 1 – Strategies for Retirement, Reemployment after Retirement and Retirement Payment Options. We have resumed scheduling live webinars upon request for groups and employers. Topics are determined based on the targeted groups within the organizations making the request. KPPA also offers in-person, phone and virtual appointments

(currently via Zoom) to members within two years of retirement eligibility and members who are eligible to purchase service credit.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

[Click here](#) to read a comprehensive summary of bills and resolutions passed during the 2022 Regular Session of the Kentucky General Assembly that have an impact on the systems operated by KPPA. Highlights include:

[House Bill 1](#) and [House Bill 604](#) KERS Nonhazardous and SPRS plans receive additional allocations

House Bill 1 and House Bill 604 provide a major funding infusion to the KERS Nonhazardous and SPRS plans. Not only did House Bill 1 (the State/Executive Branch budget bill) include the full contribution rates recommended by the KPPA actuary, additional funding of \$485 million (House Bill 1) and \$105 million in each fiscal year (House Bill 604) was earmarked for the KERS Nonhazardous and SPRS pension funds. [What is the impact?](#)

House Bill 1 did not include any allocation for a cost of living adjustment (COLA) for retirees. A couple of other bills were introduced that would have granted a COLA, but those bills did not pass. Only the legislature can grant COLA increases. For more information, visit our [FYI page](#).

[House Bill 297](#): Passage creates new health insurance plan for Medicare eligible retired-reemployed members

House Bill 297 included a statutory amendment allowing KPPA to offer a new health insurance plan for Medicare eligible members who are reemployed in a regular full-time position with a participating employer. This new plan is available October 1, 2022.

[Senate Bill 27](#): Part-Time Adjunct Instructors for the Kentucky Fire Commission

Senate Bill 27 addresses a long-standing problem for the Kentucky Fire Commission. The Commission often uses part-time adjunct instructors to fulfill their mission of training and certifying volunteer and career firefighters in Kentucky, but state retired-reemployed laws have limited their ability to do so.

This bill allows part-time adjunct instructors for the Commission who are eligible to retire from CERS and have not participated in KERS prior to retirement, to retire and draw benefits without being required to resign from their position as part-time adjunct instructor.

[House Bill 49](#): Pension Spiking

When a member retires KPPA evaluates creditable compensation growth to determine if pension spiking, a 10% increase during the last five years of employment, has occurred. House Bill 49 adds two additional pension spiking exemptions:

1. The first one hundred (100) hours of mandatory overtime required by the employer during a fiscal year; and
2. Overtime performed as a result of a local government issued state of emergency in which the Governor authorizes mobilization of the Kentucky National Guard. This provision is retroactive to May 28, 2020 and will apply toward any overtime worked as a result of the emergency through May 11, 2021 regardless of whether the National Guard was mobilized for the entire period. Retired members who had a spike for this reason will have their benefit recalculated based upon correctly completed verification from the employer.

[Senate Bill 209](#): Health Insurance Benefits

Senate Bill 209 increases the non-Medicare eligible retiree health subsidy for career members of CERS, KERS and SPRS who began participating on or after July 1, 2003, and are eligible for a fixed-dollar retiree health subsidy not tied to the premium. Additionally, it establishes a health insurance reimbursement program for retirees who receive the insurance dollar contribution. [Click here](#) for more details on the Senate Bill 209 changes.

[House Bill 259](#): Sick Leave Buyback Program

For members earning benefits in the SPRS Tier 3 hybrid cash balance plan, House Bill 259 converts unused sick leave in excess of 480 hours (i.e. 60 days) to cash balance pay credits at the end of each fiscal year. The bill also converts the member's balance of unused sick leave to cash balance pay credits upon termination of employment. The salary schedule increase began July 1, 2022 and is subject to the General Assembly funding the benefit in the executive branch budget bill. Funding has been provided for the current biennium (July 1, 2022 – June 30, 2024).

[House Bill 76](#): Service purchase for Educational Students

House Bill 76 allows members who were “bound by an educational contract prior to December 31, 2003” to purchase service credit and have that credit apply to their retirement eligibility and benefit determination. Previous legislation passed in the early 2000's placed restrictions on those service purchases effective August 1, 2004. The systems' independent actuary says this will not have a measurable fiscal impact on the systems. The bill also enhances the frequency and scope of actuarial studies for the state's pension plans.

[House Bill 9](#): Charter Schools

House Bill 9 requires public charter school classified employees to participate in CERS for the public charter school to make employer contributions to the retirement systems and health insurance plans.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

1. The KPPA website, kyret.ky.gov, is one of the largest websites in Kentucky state government (over 200 separate pages) and had over 3.5 million page views from January - September 2022. KPPA uses Facebook (16,724 followers as of 9/28/22) and Twitter (1,020 followers as of 9/28/22) to promote self service and inform members and stakeholders of news and announcements.
2. KPPA continues to livestream Board and Committee meetings and archive the videos on our Facebook page. Fifty-nine Board meetings have been livestreamed since January 2022. Those meetings have currently been viewed more than 30,000 times. KPPA began livestreaming meetings in 2017.
3. KPPA continues to focus on self service improvements. Newer features include seminar registration, message center for members and an Employer Self Service dashboard, in addition to launching online retirement in 2020. KPPA will debut its online service purchase option for members soon.
4. We continue to produce a regular electronic newsletter for Reporting Officials at approximately 1,500 participating agencies, a quarterly electronic newsletter for legislators and the executive branch, and a biennial electronic Member and Retiree newsletter. The open rates for each newsletter range from 29% to 50%, which exceeds the average open rate of 28.77% for “Government” emails.
5. The Division of Communications initiated an Email Project to increase the number of members with a valid email address on file so we can provide more information by email and lay the foundation for requiring some services to transition to online only. Through a variety of methods, such as employers reporting an email for active employees and self service promotion, KPPA has almost doubled the number of emails in our database since May 2019 (100,787 emails in May 2019 versus 188,129 in July 2022). The project team is currently working on a timeline for implementing a paperless option for members that will incorporate use of the self service message center.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

1. For the first time, the Division of Communications employed a graphic design student intern from May – August 2022. This allowed the division to completely redesign its premier publication, the Summary Annual Financial Report, leveraging the latest tools available via Adobe Creative Cloud. The internship was considered a success by all involved and will be pursued prospectively to allow KPPA’s four person Communications Division to continue to expand its digital platform and offer enhanced interactive e-publications via our mobile friendly website.
2. Since November 2020, KPPA has contracted with the Managed Medical Review Organization (MMRO) for administration of disability retirement claims. Under this new structure, KPPA staff processes incoming disability applications and handles retirement calculations while MMRO administers almost all other aspects of the review process. Once a disability retirement application is processed, KPPA staff provides the member's records to MMRO via a secure portal. From there, a MMRO nurse case manager is assigned to review medical records, distill information for the medical examiners, and identify and obtain any missing medical records. MMRO then compiles a report that is used to determine approval or denial.

After an initial transition period, MMRO fully assumed responsibility for the review process for all incoming disability applications, in addition to periodic reviews for members already receiving a disability benefit.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

We would be interested to hear how other systems are successfully communicating their “story” to their state legislature... electronic newsletters, brochures, booklets, etc.? Also, how are other systems explaining their investment strategies to their members and the general public?



Louisiana State Employees Retirement System



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# Active Members	# Retired Members	# Inactive Members	Staff Size		Assets (\$)
49,747	50,946	3,868	137		\$13.24 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Upon the lifting of the state-issued stay at home order, LASERS staff returned to in-office operations. LASERS has since issued a telework policy allowing LASERS staff to telework from an approved alternate worksite upon completion and approval of a formal telework agreement. Eligible staff may telework a maximum of two days per week, per the agreement and policy.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Pre-Retirement Education Program (PREP) - Available to all members of LASERS not yet retired. Topics include eligibility requirements and the types of retirement, unused leave, retirement options, purchases, survivor benefits, LA Deferred Compensation (457 plan), and Social Security offsets.

Early Career – Geared toward newer members not within five years of retirement eligibility aiming to familiarize the members with the invaluable benefits of a defined benefit plan. These are currently held virtually.

Know Before You Go Breakout Sessions – Topic specific shorter virtual presentations to provide more in-depth information on LASERS. Currently, "DROP vs IBO: Is Either Right for Me?" is available.

Open Forum – Annual meeting for Human Resources and Payroll personnel from participating agencies.

Retiree Workshops – Annual workshop for retired members including information on LASERS topics, health insurance, Social Security, and other topics of interest. Community partners such as the Y, RSEA, local libraries, and non-profits attend to promote services and volunteer opportunities.

Individual Counseling Sessions – Appointments scheduled for members within 18 months of retirement eligibility. These are held in-person, by phone, and virtually through Microsoft Teams.

Millennials Investing Now for Tomorrow (MINT) – Emails targeting LASERS members between ages 20-35, encouraging smart financial decisions and early retirement planning.

Retirement Readiness Fairs – Annual fairs for all state employees that provide information on preparing for all aspects of retirement, targeting Financial Security, Healthy Living, and Happiness and Engagement. Community partners provide information on their services and volunteer opportunities.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Senate Bill 5, by Senator Ed Price, a bill to provide a nonrecurring supplement payment to LASERS retirees and beneficiaries passed both chamber of the legislature and was signed by the governor. Eligible payees received an additional payment in August 2022, capped at \$2,000.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

LASERS member portal, myLASERS, allows members to access their account information with a multi-factor authentication process and can use the online features such as the online calculator, view account information, and complete eForms related to certain processes. Future enhancements include a more interactive appointment scheduling process.

LASERS shares information with members through the Member Connection email service, reaching over 65,000 members and retirees. Facebook and Twitter are used to disburse information. The LASERS YouTube channel serves as the video library for our in-house produced education and how-to videos.

LASERS finalized the implementation of a new, cloud-based phone system providing additional options for telework, business continuity, and future options for a full range of additional contact center communications. The improved system incorporates both the call center experience for the member and overall agency use and improves statistical tracking and trends of the call center. The system aims to implement a chat feature for future communication opportunities.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

The “Know Before You Go” breakout session series recently launched with the first session, “DROP vs IBO: Is Either Right for Me?” Future breakout sessions will include, “Understanding Your Benefit,” “Survivor Benefits,” and more. These sessions are currently scheduled to last between 1-2 hours and are held virtually.



Massachusetts Teachers' Retirement System



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
96,000	70,000	30,000	94 FT, 14 PT	32.1 B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

On June 15, 2021 our governor ended the state of emergency, and we opened our two offices to the public while maintaining a limited number of staff in each of our two offices. We slowly transitioned to a larger in-office workforce with all staff now working at least two days per week in our offices. Although we are closely monitoring the COVID-19 trends, we will begin our permanent hybrid work model on October 3, 2022 with staff expected to work in-office at least two days per week and managers expected to work in-office at least 50% of their work schedule (2 days/week & 3 days/week).

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Although all in-person educational initiatives remain cancelled until further notice, the MTRS remains committed to educating our members about the retirement plan, as well as providing active and retired members with educational opportunities addressing financial and life issues related to retirement. To that end, under normal circumstances, the MTRS provides programs for members at various life stages:

- **Your MTRS Benefits** – for members at any stage - 2-hour program, held at various locations across the Commonwealth, focuses on retirement formulas, creditable service issues, Social Security offsets and other post-retirement issues. **As an alternative to our in-person programs, we recently held 2 virtual seminars via Microsoft Teams (Events).**
- **The Next Chapter** – for members 5-15 years from retirement - comprehensive, all-day preretirement planning program including MTRS benefits, financial planning, estate planning, and the transition to retirement. The program features speakers who are experts in their field.
- **Ready for Retirement** – for members within one year of retirement - 2-hour, after-work program for our soon-to-be retirees. During this nuts-and-bolts seminar, members learn exactly what to do—and expect—as they go through the retirement process.
- **Retirement U** – for retired members - half-day program covering various topics such as estate planning, financial tips for retirees, fraud prevention, health issues, and resources to help retirees maximize their retirement years financially and personally.
- **Constituent group presentations** – we provide programs tailored to the needs of various groups, including superintendents, vocational educators, school business officials, etc.
- **Retirement Group Counseling** - held for 12-15 members at a time, every other week, in both MTRS offices. We cover the MTRS benefits with the group and then provide each participant with an individual estimate and counseling.

Additionally, beginning in April 2021 we've held several virtual benefits seminars via Microsoft Teams Events with between 500 – 1,000 attendees participating at each seminar.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Effective April 2, 2012 our legislature passed the third significant pension reform law in a three-year period, which created a new benefit tier for members who enter the retirement system on or after 4/2/2012. It increased the minimum retirement age from 55 to 60 with at least ten years of service and repealed the ability for members to receive a reduced benefit with 20 years of service at any age. Under the new tier, new members are subject to reduced age factors, and a five-year salary average instead of a three-year salary average. After 30 years of service, the employee contribution rate for members under the new tier will decrease from 11% to 8%. Additionally, corrective legislation recently passed that changed the process for members who transfer into the MTRS from another public retirement system in MA, specifically regarding the election to participate in the enhanced alternative retirement program. We're currently working to successfully implement the new legislative initiative.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

When we rolled out our new computer system from 2012 – 2014, the Member Self-Service (MSS) rollout was limited due to a lack of automated creditable service data. In FY 2018, we completed a creditable service conversion project that will allow us to offer the full MSS functionality. The first phase of the MSS rollout occurred in late 2017, which included the ability to view the member's account information, estimate retirement benefits, view beneficiary info, and initiate certain service purchases through the MSS system. The last phase of the MSS rollout occurred in late 2018, which allowed certain members to view their complete creditable service history. Due to data integrity issues, certain members can only view some of their creditable service history, and we continue to deal with manual data cleanup and fixing member accounts with complex issues.

Presently, we do not provide web counseling, nor do we use FB, Twitter, or other social media to communicate with our members. We conducted a survey of our active members in 2017, and again in 2021, regarding their preferences for various modes of retirement education, and the overwhelming majority indicated they would not be interested in receiving retirement information via social media.

Section 5: New Initiatives – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We continue to expand our online educational videos for both employers and members. We currently have six tutorial videos available to employers which cover: *Creating a Payroll Calendar in MyTRS* (our computer system); *Importing a Deduction Report*; *Termination Events in MyTRS*; *Registering a new Employee in MyTRS*; *Retiree Insurance*; *Completing Part 2 of the Retirement Application*.

As for our members, we currently have 18 tutorial videos which cover: *Enrollment*; *The MTRS and You*; *Member Self-Service Accounts (creating, username/password assistance)*; *Leaving MTRS service prior to retirement (Leave your funds on account; If eligible, receive a retirement benefit; Take a refund)*; *Your contributions*; *Types of retirement benefits*; *Regular creditable service*; *Purchasable creditable service*; *The three retirement options: A, B and C*; *The retirement formula*; *Retiree health insurance*; *Working after retirement*; *Taxation of your benefit*; *Cost of living adjustments*; *Preparing for retirement*; *Completing the retirement application*; *Welcome to retirement*.

Additionally, at the end of CY 2019, we began work on a computer system (application) upgrade project, which is our first upgrade since we converted from our legacy system to our current system about nine years ago. The upgrade project was completed in December 2021 with the transition for staff, members, and employers on-going throughout CY 2022.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

As our system continues to rollout more MSS functionality, we would be interested in hearing more about other system's experiences with their MSS initiatives. What have been some of the greatest lessons learned? What have been the greatest challenges so far, and how have you overcome them? Additionally, we would like to talk to other systems that offer educational videos, retirement planning webinars, and/or video counseling sessions for members and/or employers. Specifically, what has worked well, and what hasn't worked well? Finally, we would like to discuss computer system (application) upgrades with other systems that have recently upgraded their applications.



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Lisa Maloney		Chief Administrative Officer	978-439-3008	lmaloney@middlesexretirement.org	
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)	
9,403	6,388	4,438	13	\$2.0 billion	

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Staff have been working full-time on site since June 2020. From June 2020 until August 2021, we accommodated staff schedules to address the challenges with homeschooling and limited day care options. As of September 1, 2021, we resumed our normal hours of operations and employees returned to their pre-pandemic schedules.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

The Middlesex County Retirement System (“MCRS”) offered virtual member education programs in spring 2021 and 2022. We intend to resume in person meetings next year and supplementing those meetings with a virtual option. This fall, we will resume in person Employer Training Programs and supplement it with a virtual program as well.

Middlesex County Retirement System employs a part-time social security consultant to deliver educational programs regarding social security benefits, the Government Pension Offset, and Windfall Elimination Provision. This segment was included in our virtual member meeting. In addition, she has been providing telephone counseling to our membership.

We are exploring targeted communications for new members.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Recently enacted legislation protected retirees from downward modifications of pensions due to recent MA court decisions designating payments of accrued leave in conjunction with workers’ compensation and sellbacks of unused vacation time as non-pensionable. Pending legislation would expand the period of time for purchasing military service credit, would amend the “all or nothing” pension forfeiture provisions of the MA retirement plan, would exempt salary increases related to gender pay equality from the anti-spiking laws, and would allow for the use of employer incident records to satisfy the notice of injury requirements for emotional disability retirement.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Middlesex County Retirement System interacts with its membership by posting information on its website, publishing newsletters, and delivering newflashes via email. We do not have a social media presence. We currently offer employer self-service for contribution reporting and the submission of Enrollment and Separation of Service forms.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

This fall Middlesex County Retirement System will be implementing a member self-service portal to provide active and inactive members and retirees access to their account information. Among other features, active members will be able to generate estimates. Retirees will have access to their 1099 information and be able to generate income verification reports requested by the Social Security Administration.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?



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Member Education Contact		Title		Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size		Assets (\$)
243,342	287,750	22,293	167		\$87.4 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

After 26 months of working primarily from home, ORS transitioned to a hybrid staffing model with everyone required to work a minimum of two days per week in the office, starting in May 2022. An estimated 90 percent of ORS staff currently work a hybrid schedule.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

At the start of the pandemic we switched our member education delivery from a series of in-person meetings across the state to a recorded seminar that is available 24/7/365. Members can now watch at their convenience and can rewatch segments pertinent to their situation. We also made our companion workbook available as a PDF online.

In November 2021, we started a year-long, multi-channel campaign that centers on the importance of women actively engaging in planning for their retirement. After 11 months of focusing on education and accompanying resources, we are wrapping it up this month with five specific calls to action for which we are tracking metrics. Michigan.gov/WomenAndRetirement

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Public Act (PA) 184 of 2022 was signed on July 25 to simplify working after retirement rules for public school retirees. The biggest change allows public school retirees who have a bona fide termination and have been retired at least nine consecutive months to work at a public school with no earnings limit and no effect on their pension or insurance premium subsidy.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

miAccount is our online tool where members can track their contributions and service credit totals, designate a beneficiary, estimate their pension, and apply for retirement.

We do not provide web counseling.

We have 29k+ followers on Facebook and 3,000 followers on Twitter. We post to both sites daily.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We have formed a Defined Contribution education team to take a more active role in communicating with our DC participants. This work had previously been handled solely by Voya. The Women & Retirement campaign mentioned in Section 2 was our first venture into DC space. We now schedule regular meetings with Voya to discuss communication opportunities.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

More communication topics. Consider having multiple topics available to choose from instead of just one at a time.



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
81,821	69,033	56,017	91	30.2 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We have allowed a majority of our staff to remain teleworking. If they prefer to be in office, they may now do so. A few must come in on a regular, approved schedule. They then must work in the office for the entire work day. Our front desk staff are in every day. Most of our counselors rotate so that we have one for in office and one for walk-ins available each day. We offer in person presentations when requested. Most members seem to prefer virtual counseling now. We have IT staff in the office as needed for set up, equipment distribution and other needs. Our board meets in a hybrid format though the board itself prefers meeting in person. Many more public members attend the board meetings of interest in a virtual format.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We continue to boost and update our video library. We also review all hard copy publications on an ongoing process as well as update the website. Our social media posts are regularly scheduled. We have presentations for both early/mid-career as well as preparing for retirement stages. These presentations are available to employers in person or as webinars. Members can register to attend them as webinars or watch a recorded version. As mentioned above, our counseling seems to be preferred virtually.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Fiscal year 2022 ended with three significant changes relating to our agency:

- Advance Practice Registered Nurse (APRN) added as a role that can complete a disability medical examination report.
- Suspension of our earnings limitation for Pre-K-12 teachers for FY 22, 23, and 24.
- Out of state service purchases as of January 1, 2023. Members must be vested and actively teaching and all refunded service must be repaid, if at any Minnesota defined benefit public pension plan. The member will forfeit all rights to benefits for that same period of time. This cost is done at full actuarial cost.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Our members, upon creating a user ID and log in, have access to view payments, service credit, documents can be uploaded to us directly using our secure messaging. Likewise, we can use messaging to instantly send documents. There is a secure portal in which to send us direct messages. We have seen the use of this tool increase with the in-person restrictions that were in place. Active members can schedule appointments, view their service credit and download documents such as beneficiary forms to complete. Web counseling is offered to members along with limited in person counseling.

We offer a comprehensive video library on our website, a chat option, and group presentations/webinar information. And a presence on Facebook.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

- Making system updates to accommodate the new W-4R, W-4P and W4-MNP forms prior to the January 1, 2023 extension we've been given. We've revised and created new correspondence for our members informing them of ramifications if they don't submit one of the forms. We're still updating this to all communication formats.
- We've developed annual batches to help assist the RMD process. The fund was focused on cleaning up the member data prior to running our RMD batch this past year. We have a couple of manual projects that we'd like to have programmed into our system. One of the manual projects is to notify the members proactively, one to two years prior to RMD age, of the process.
- While W4 and RMD process updates have slowed other enhancements, we are still hoping to work on embedding videos in our online processes.
- We would also like to move to an electronic newsletter option.
- Opt in/Opt out of paper mailings.
- Making direct deposit mandatory for all new annuitants/beneficiaries.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Hearing about how funds are moving forward and having their members use their online portals more for upload and completing processes. Example: Members can complete their beneficiary form online.



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
4178	4094	526	7	\$692M

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Our office is currently only open to members and the public by appointment only. Our staff works remotely two days a week with staff selecting the days they prefer to work from home. All staff are in the office together one day per week to allow for staff meetings. Board meetings are still being held via Zoom.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We have participated in New Hire Orientation at the public school district and have offered to present to charter schools. We do have a pre-recorded video that is posted on our YouTube page for New Employees. We were able to forward that link to all school leads and HR departments. We will be holding several pre-retirement seminars in the spring of 2023.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

No new legislation for our system unless our board votes to change the Working After Retirement hour limitations at a board meeting later this year.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We currently send out newsletters twice a year and communicate through the school's method of communication. Our members can access their account through our member portal and website. We do provide member counseling through scheduled Zoom meetings or in-person if the member prefers. In the spring, we will have in-person and Zoom retirement seminars.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We are looking at various methods of communicating with our members – like Facebook, Twitter and Instagram as well as improving our website.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

We would love to see more ideas about social media outreach and seminar topics as well as targeted communication.



Missouri Local Government Employees Retirement System



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Member Education Contact		Title	Phone #	Email Address
Jeff Pabst		Education & Outreach Coordinator	573-632-6388	jpabst@molagers.org
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
39,000	19,000	9,000	38	10.5 B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We have been in office since May of 2020 and returned to the field in early 2021. It was somewhat challenging at the time, but has since been a smooth transition.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We offer a wide variety of in-person member and employer educational seminars throughout the year. Prior to, during and after the pandemic, we offer 4-5 web events per month. The attendance to these meetings has been less than desired of late and we are working on strategies to increase.

Regional - In-Person Meetings Include:

- Pre-Retirement Seminars
- Employer Rate & Human Resource Meetings
- Retiree Link Meetings
- Annual Meeting – Stakeholder Updates & Elections

Virtual:

- Pre-Retirement Seminars
- Webinars – Short and Specific Topic
- Employer impromptu meetings

We also offer on-site presentations for our more than 840+ employers across Missouri. The variety of on-site sessions include new hire programs, management training, pre-retirement seminars, and others. Demand for these meetings are extremely high and may be part of the reason why other regional meetings attendance has been smaller.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Recently passed legislation allowing for subdivisions to individually add a Public Safety department to allow EMS personnel, jailers, and dispatchers an age 55 retirement. Demand for this provision is extremely high.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We use a wide variety of technology for engaging members, employers, and retirees. We have an online member web portal that allows active members and retirees to access their benefit information. Members can generate benefit estimates, update their contact information and apply for retirement on the online system. Retirees can download their tax documentation, update contact info and update tax withholding.

We currently don't provide web counseling, but we provide several online pre-retirement seminars. We are researching web counseling and I would love to learn the dos and don'ts from everyone.

We are using targeted email by audience and age group, Facebook, videos, twitter and linked in. We are a small staff, so our bandwidth on these is limited.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

LAGERS has 840+ subdivisions who participate in LAGERS who can all elect their own level of benefits within our system. We are working to implement some employer education initiatives over the next year. One is one-on-one “help desk” sessions for our employers who are stuck/struggling on a monthly reporting process. As well, we are looking to create more online tools and re-format in-person training tools to better engage and educate our employers.

We recently implemented a new-hire email series that has had some great success with a 70% open rate! In the next couple of months, we will be implementing a pre-retirement email series that we will run over several months.

The recruitment of public servants has always been challenging and is even more difficult now. So, we recently deployed a recruitment website for our employers to use: <https://www.molagers.org/join-the-lagers-community/>. This takes a sales pitch approach potential members considering public employment. It explains the financial value of a our benefits as well as shows the community impact a public servant makes on his/her local community. Our employers are actively using the link and giving additional feedback for future enhancements.

We have implemented many different ideas that have been inspired by ideas shared at the NPEA conference including our new hire programming and the use of KaHoot in some of our presentations.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Online Counseling Sessions, New Hire Initiatives, Employer/Plansponsor Training



Public School and Education Employee Retirement Systems of Missouri



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members*	# Inactive Members*	Staff Size	Assets (\$)
129,019	103,827	62,346	156	\$53.5B

*The 'Retired Members' count is representative of all benefit recipients (SRs, DRs, BAs) and the 'Inactive Members' count is representative of Inactive and Terminated members combined.

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We have returned to the office full-time, however, we have adopted a teleworking policy that allows employees to work from home. The frequency of work from home varies by department across the entire organization. Wednesdays have been designated as “all in office” days. All staff meetings and other group functions are planned on Wednesdays to all the face-to-face interaction of all staff The Member Services department currently can work up to two days per week at home depending on the needs of their sections. Our Information Center (Call Center) is allowed to telework up to four days once certain criteria is met. Our Member Education section has an ad-hoc telework schedule due to the travel requirements necessary for the job. We have also made virtual seminars and webinars a permanent part of the programs offered to our membership.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

RetireSMART: Beginner Basics – an introduction to the benefits and advantages of the defined benefit plan, including membership basics, vesting requirements, contributions, beneficiary designations, etc.

RetireSMART: Education Essentials – attendees receive a general overview of their PSRS/PEERS retirement benefits with a primary focus on aspects related to this point in their careers. Discussion topics include advantages of a defined benefit plan, retirement eligibility and calculating benefits, purchasing and reinstating service, etc.

RetireSMART: Retirement Ready Seminars – an in-depth overview of the retirement system that is designed for members planning to retire within the next five years, but all members are welcome to attend. Seminars include information regarding retirement eligibility, calculating benefits, purchasing and reinstating service, retirement payment plans, COLAs, health insurance, working after retirement, etc. These meetings are held all year long, throughout the state at various locations as well as in Jefferson City, MO at the PSRS/PEERS office. We also offer a virtual seminar option at various times throughout the year.

Featured Topic Webinars – provided throughout the year on various topics including purchasing, understanding your benefit estimate, applying for retirement and considerations after retirement.

Real Talk Webinars – offered monthly, these webinars are 15-20 minutes and focus on one popular topic or frequently asked question from members.

Quick Counseling Sessions – offered at the request of an employer, this program provides individual, one-on-one counseling sessions at the employers' location. Each session lasts 15 minutes and allows members the opportunity to update their personal information in our system, ask specific questions about their retirement system and receive estimated benefit amounts.

Web Counseling Sessions – provides members with an individual counseling session that is face-to-face but from the convenience of their home, place of employment or any personal computer with internet access.

In-Office Counseling Sessions – are available to all interested members who would like to meet one-on-one with a retirement counselor at the PSRS/PEERS office in Jefferson City, MO. Walk-ins are welcome but prior appointment registration is preferred.

Phone Counseling Sessions – offered to all members who would like to speak with a retirement counselor at a designated time that is convenient for them. Appointment times are available Monday-Friday, during normal business hours and evening sessions are offered several days throughout the month.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The Missouri General Assembly passed a bill which contains a provision that waives the working after retirement limits on part-time or temporary-substitute work performed by PSRS/PEERS retirees as **substitute teachers** for covered employers or third-party providers. The waiver is in effect from July 1, 2022 until June 30, 2025. The temporary work limit waiver is designed to help address the continued shortage of substitute teachers at public school districts around the state.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Power Business Intelligence Tool (Power BI)- This product delivers rich interactive reports that allow us to explore data visually, quickly discover patterns and make better, faster decisions. We can identify errors in data, analyze internal processes, monitor website activity and better understand our membership and how they interact with our retirement systems.

Employer Web Portal (EWP) – This is the secure portal integrated with our pension administration system and utilized by our covered employers for the purpose of retirement reporting (annual base, service, insurance, GASB 68, etc.). Important information and reports can be accessed from EWP along with a variety of resources. The portal was launched in 2014 and was recently updated to be more user friendly. The updates were made in large part due to feedback from our employer community.

Web Member Services (WMS) – A secure portion of our website where members can view information in real time about their membership, such as demographic information, beneficiaries, purchases, benefit plan options, tax information and COLAs.

Through WMS members can change their address, direct deposit information, tax withholding amounts and beneficiary designations. Members can also file for service retirement, upload documents and view post-retirement work reported by covered employers. WMS features several tools that assist members with retirement planning, such as a Benefit Estimator purchase cost recovery calculator.

Members registered for WMS have the option to elect to receive newsletters, annual statements, newsflashes and Board of Trustee meeting summaries electronically versus paper and can change their preferences at any time.

Chat - Our live chat feature is available for members who are logged into their Web Member Services account. This feature allows members the opportunity to chat securely with a retirement counselor about their personal membership and benefit information.

Web Counseling - PSRS/PEERS offers web counseling sessions as a more convenient way for members to learn about their retirement without having to drive to Jefferson City.

Virtual Seminars – Our Retirement Ready seminars are offered monthly both in-person and virtually. However, during the winter months, when travel is difficult, virtual seminars are the only option offered to members.

Webinars – We offer webinars on a variety of topics each month so our members can choose a day and time that works with their schedule to learn more about their retirement.

Website - PSRS/PEERS updated the content and organization of the public website a year ago. The website is organized by life events. Utilizing “cards” on the site we can direct members more directly to information pertaining to their life event – marriage, divorce, retirement, death, etc. We have streamlined a lot of the content and added more relevant photos and icons to make the page more appealing and user friendly. The news portion of the site was reduced, and Member Tools was added in a more prominent area of the home page. Member Tools were identified by our Call Center as the forms and information most requested by members when calling or emailing.

Social Media - PSRS/PEERS utilizes Facebook and Twitter to share information with our audiences.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

Online Beneficiary Changes - Prior to September 1, 2021, only members within their first 18-months of employment could update their beneficiaries through Web Member Services (WMS). As of September 1, 2021 we began allowing all active/inactive members update their beneficiaries online. This change caused a 120% increase in beneficiary changes when comparing 2021-2022 to the previous year (2020-2021). As of May 2022, all eligible post-retirement beneficiary changes became available to benefit recipients on WMS.

WebEx integration – We began researching and planning to better integrate WebEx (software used for webinars and web counseling) registrations with our current systems to make the process more streamlined for our members, employers and staff. The purpose of this project is to find a way for members to see and register for all available meetings in one location and cut down on time staff uses for manually adding members/employers to meetings.

Tax Cuts and Jobs Act- Passed by the IRS, this act requires members to begin using IRS form W-4P and/or W-4R for all federal tax withholdings on monthly pension payments and all lump sum payments. New correspondence, forms and staff training was completed over the last year. PSRS/PEERS went live with the new forms on September 1, 2022 (implementation is mandatory on January 1, 2023).

Chatbot – This provides more interactive capabilities to the public website allowing members to obtain answers to their questions more efficiently and without calling/emailing the Information Center. Our public website utilizes Sitefinity and the Chatbot integrates with the current CMS we are using making implementation relatively easy. The Chatbot is due to launch in March 2023.

WMS Secure Inbox – We are creating an inbox within WMS for member correspondence and will develop functionality that allows staff to send member requested documents directly to this inbox. This will greatly reduce the need to send secure emails which expire after 7 days.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Presenter Evaluation Methods – Now that we have new ways of engaging members during presentations, it's important that we sustain our newly developed presentation skills for the future. We are looking for information on how other systems evaluate their presenters as well as how often these evaluations take place. We are also looking at other areas to evaluate our staff outside of just presenting such as phone calls, chats, and counseling sessions. We would be interested in learning what other systems are evaluating, how often, and any software that is used.



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
146,324	114,662	85,039	167	\$35.9 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We have been back in the office since July 1, 2021, but have allowed various departments to work remotely up to two days a week. While staff does meet in person with members, we do allow virtual meetings, when requested, and we ask for all appointments to be scheduled to decrease the number of walk-ins. This helps staff better prepare for meeting with members and has provided some ease to the number of people waiting in our lobby. Since the pandemic began, we have noticed more staff turnover. We currently have roughly 25 vacancies, which for our 167 positions, is significant. We can't definitively say this turnover is the result of the pandemic, but the last two years have been a marker in this change.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We offer the following education programs:

1. **Pre-Retirement Full-Day Seminars** are held throughout Mississippi and provide members with information on a range of topics.
2. **PERS Focus Sessions** are small group sessions conducted bi-weekly at PERS and provide comprehensive information on the retirement process, including available benefits and options.
3. **PERS on the Move** is a two-hour program held at employer work sites and provides information on available benefits and options.
4. **PERS Employer Training** is held annually during the summer months to provide information to personnel responsible for the administration of benefits and the reporting of wage information.
5. **Early Career/New Employee Seminars** are held at employer work sites and provide members with an overview of PERS and what it means to be a part of a defined benefit plan.

We have limited the number of individuals allowed to attend each education program and some programs are conducted virtually.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

House Bill 252 (Regular Session 2022), effective July 1, 2022 - Increases from 10% to 20% the maximum percentage of investments in the basket clause found in 25-11-121(p)

House Bill 1595 (Regular Session 2022), effective July 1, 2022 - PERS FY 2023 Appropriation (Budget) Bill

House Concurrent Resolution 77 (Regular Session 2022) adopted March 31, 2022 - A Concurrent Resolution to condemn the invasion of Ukraine and to sever all economic, financial cultural, and other connections with the Russian Federation, its leaders, and its businesses.

Senate Bill 3067 (Regular Session 2022), effective April 8, 2022 - Authorized the City of Meridian to provide an annual cost-of-living increase of 2% every July 1 for the Meridian Police and Fire Disability and Relief Fund and the Meridian General Municipal Employee Retirement Fund.

Senate Concurrent Resolution 563 (Regular Session 2022), adopted March 24, 2022 - A Concurrent Resolution to condemn the invasion of Ukraine and to sever all economic, financial, and other connections with the Russian Federation, its leaders, and its businesses.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

The agency offers digital connectivity to members, employers, and benefit recipients through its eUpdates, brief e-mailed news alerts regarding legislative and/or administrative changes that affect the retirement plans administered by PERS. During the pandemic, the agency began offering videoconference options for members taking part in our education programs.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

No new initiatives.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Call Center Metrics, Service Retirement counseling sessions for walk-ins, and Retirement Application processing practices and procedures.



New York State Teachers' Retirement System (NYSTRS)



Benefits Contact		Title	Phone #	Email Address
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Communications Contact		Title	Phone #	Email Address
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Member Education Contact		Title	Phone #	Email Address
Heidi Brennan		Manager, Education & Outreach	518-447-2911	heidi.brennan@nystrs.org
# Active Members	# Retired Members (including beneficiaries)	Inactive Members	Staff Size	Net Assets (\$)
253,258	178,569	10,217	380	\$132.0B as of 6/30/22

Section 1: Pandemic Impact – Please describe return to office and staffing, on premises vs. remote work, etc.

NYSTRS continues its operational flexibility in the wake of the pandemic. Our workforce remained flexible as we adapted policy as needed to match fluctuating COVID conditions in our region. Our Information Technology division was able to adapt to the needs of a remote workforce and is currently supporting a fully hybrid work environment. We are testing a Flexible Work Pilot program for the 2022-2023 fiscal year where employees are granted a bank of telecommuting time which varies based on job duties. We have been able to maintain our high standards of customer service to members, and the System continued to provide benefits without interruption.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Among the services we offer are:

- A contact center, which responds to member phone calls, emails, secure messages and correspondence.
- A comprehensive website at NYSTRS.org, which includes a wide range of self-service tools in our secure MyNYSTRS area, as well as a Pension Education Toolkit.
- A mobile app for members, which features key retirement planning information by tier and the latest NYSTRS news.
- One-on-one benefit consultations, in which we walk members through the retirement process and key decisions they must make, answer their individual questions, and provide them with benefit estimates. Consultations are being conducted by telephone, personal device video, and at eight video consultation sites around the state. Limited in-person appointments are available. Personal Device Video consultations are very popular and we added additional such appointments to the schedule to meet the demand.
- Pension & Retirement Education Program (PREP) seminars provide a thorough review of NYSTRS' benefits and also cover topics such as estate planning, Social Security, and adjusting to retirement. These in-person seminars have been on hold since the pandemic began. To continue sharing this important information, recorded videos of each of our PREP modules are available on our website for members to access at their convenience. They also provide a convenient reference to those who attended an in-person seminar previously and seek a refresher on certain material.
- Our *Benefit Profile*, a comprehensive annual statement provided to all active members that summarizes their service and salary information, offers retirement planning information, and includes benefit projections and eligibility information for disability benefits, death benefits, and loans.
- A 24-hour automated hotline, which enables members to order forms and publications, and hear announcements about the latest NYSTRS news.
- Our online video library, which features a host of videos for members, including "A Two-Minute Tutorial for New Members" (which is emailed to our newest members) and a four-part "NYSTRS Benefits" series that provides an overview of NYSTRS benefits, service credit, benefits calculations, and the retirement process.
- Monthly mass emails, which educate members in various stages of their careers (e.g., an introduction to NYSTRS and the importance of membership for new and early stage members; an overview of NYSTRS services and benefits for mid-career members; and important retirement planning tips for late-career members.)

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Chapter 56 of the Laws of 2022 impacted the Retirement System as noted below:

- Earnings in Retirement: Part HH amends Section 211 of the Retirement and Social Security Law to allow a NYSTRS retiree to be employed and earn compensation in a position at a school district or Board of Cooperative Educational Services (BOCES) without suspension or diminution of their retirement allowance. Earnings received from April 9, 2022 to June 30, 2023 will not be applied to the standard earnings after retirement limitation of \$35,000 in New York state public employment per calendar year.
- Employee Contribution Rate for Tier 6 Members: Part SS amends the Retirement and Social Security Law to permit the employee contribution rate for Tier 6 members (members with a date of membership on or after April 1, 2012) to be determined using only a member's annual base wages for contributions to be made during the two fiscal years ending June 30, 2023 and June 30, 2024. Compensation earned for extracurricular programs or any other pensionable earnings paid in addition to the annual base wages will not be included in the employee contribution rate determination.
- Vesting for Tier 5 and 6 Members: Part TT amends the Retirement and Social Security Law by reducing the number of years of credited service required for vesting to five years for Tier 5 and 6 members for purposes of eligibility for a service retirement benefit or a deferred-vested retirement benefit. Prior to this change, Tier 5 and 6 members needed to have 10 years of credited service to be vested for a service retirement benefit or a deferred-vested retirement benefit.

Earnings After Retirement Suspension

To help recruit retired public employees to assist the state through its COVID-19 crisis, the governor issued an executive order that temporarily suspended the earnings limits that retirees under the age of 65 normally have when they return to New York State public employment. The earnings limit has been temporarily suspended at times, which resulted in no earnings limit for pay earned:

- From March 27, 2020 through Dec. 31, 2020.
- From Jan. 1, 2021 through June 24, 2021. *(The governor rescinded the executive order effective June 25, 2021; therefore pay earned from June 25, 2021 through Sept. 26, 2021 counts toward the annual \$35,000 earnings limit.)*
- From Sept. 27, 2021 until Oct. 27, 2022.

Newly enacted legislation, [Chapter 56 of the Laws of 2022](#), extends the retirement earnings cap suspension through June 30, 2023. The new law only applies to retirees who return to work at a public school district or BOCES. Employment at a charter school, community college, SUNY, or any other public employment is not covered by this law.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

- We talk to our members by phone and correspond by email, secure message and letters.
- We conduct virtual presentations to train participating employers, as well as offer group benefit presentations virtually to members upon request by a district.
- We post informational videos on our website for members to access at their convenience.
- We offer MyNYSTRS, a secure online portal that our members can use to access their NYSTRS information and a wide range of self-service tools. They can apply for a loan, apply for retirement, schedule a phone or personal device video consultation, correspond with us via secure message, run pension and loan estimates, print a verification of income / contributions, download a 1099 statement, submit a prior service claim, change their direct deposit and withholding election; track the processing of their retirement benefit, elect e-publications rather than mailed newsletters or statements, update their address or beneficiary designation and report their post-retirement earnings. Members with a Domestic Relations Order (DRO) on file can see their relevant DRO information.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We are working on a significant upgrade to our contact center technology which, in part, will use Artificial Intelligence (AI) tools to allow members more efficient access to information when they call. Implementation is expected by early 2023.

NYSTRS continues to expand its efforts toward development of a more diverse and inclusive organization with the appointment of an executive level Managing Director of Diversity, Equity and Inclusion (DEI). We have also enhanced our diversity recruitment strategy by implementing search panel DEI training, expanding recruitment outreach, and establishing inclusive interviewing and onboarding practices.

Our commitment to DEI extends to our external partners as well. Managers and consultants must provide diversity and inclusion information about their firms or general partners as part of the System's due diligence review process. NYSTRS also holds an annual Minority- and Women-Owned Business Enterprises (MWBE) investments and professional services conference to provide emerging businesses and managers the opportunity to partner with us. In 2022, this event was ^{[[1]]}_{SEP} held virtually.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?



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Communications Contact		Title	Phone #	Email Address
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Member Education Contact		Title	Phone #	Email Address
Denise Weeks		Retirement Programs Manager	701-328- 9878	dcweeks@nd.gov
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
11,806	9,438	3,255	20	\$3.1 B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We continue to work hybrid work schedules alternating between work from home and working in the office. We have been fortunate to have very few instances of COVID-19 in our office as we are a very small agency.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We are open for appointments but will take walk-ins if staff is available. We are starting in-person group counseling sessions as well as continuing the virtual sessions as well. We also hold individual virtual sessions which is very popular. Once again, we were able to hold an in-person retirement education workshop offered for all members. Program topics include Teachers' Fund For Retirement (TFFR) benefits, financial planning, Social Security benefits, estate planning, and health insurance options. We bring in outside professionals to present the

Since the pandemic, TFFR has many more virtual platforms to use for outreach programs. Because of that, we are now offering business manager (employer) education opportunities. We started a monthly Business Manager Info-Mixer which is a 45-minute virtual group session on specific topics such as new hires, forms, retirements/terminations, reportable retirement salary, employer payment plan models, etc.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The upcoming legislative session could be interesting. Our state sister program, NDPERS, is currently defending their DB plan as there is a bill to close it and offer a DC plan. If this passes, rumor has it that the TFFR plan will be next.

TFFR has submitted a bill to clean up some language in the Century Code, modify the Return To Teach program, and to remove the level income payment option.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

On top of all the changes, we are going through a Pension Administration System (PAS) conversion. We are currently in year two and have two more to go. Our consultant has been a tremendous help and would recommend hiring a consultant as the first step in a system conversion. We selected a vendor, completed the requirements phase, and are currently in the elaboration phase.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

It's been a long time in the making but our agency is finally in the process of hiring a Communications/Outreach Coordinator! NPEA has brought forth many ideas addressing how to communicate with and educate members. We will continue to use NPEA members for tips and tricks of the trade.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Return to Work, mid-career outreach, and new hire programs.



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Communications Contact		Title	Phone #	Email Address	
Member Education Contact		Title	Phone #	Email Address	
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)	
3800	4100		12		

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We never left our office during the pandemic. Our services were deemed mission critical and all of our staff continued to work in person in office during the height of the pandemic.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We are creating a Member Counselor position that will begin to offer more personalized assistance for our active employee members to help them better understand their Retirement plan, the retirement process and planning for a successful retirement.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We rolled out a member access portal in 2018 to allow members to view their account summary, and to create estimates for future retirement dates. In the autumn of 2022, we are making that portal available to our retiree/pensioner population so they can view their monthly pay advices online and elect NOT to receive their monthly pay advices in hard copy via USPS.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

In 2021 we developed an improved pension pay advice that provides an enormous amount of data related to each pensioner, such as designated beneficiaries, eligibility for burial benefit, current healthcare coverage and premiums paid, designation of a Durable POA, and direct deposit information. The new pension pay advice has been received with great satisfaction and helped to relieve much confusion and misunderstanding among our pensioners.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Online or electronic authentication (electronic notaries, e-sign, etc). Customer call center options.



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Member Education Contact	Title	Phone #	Email Address	
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
290,320	219,062	699,457	474	\$126.2 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Late in 2020, leadership realized the hybrid work environment was proving successful, and staff and management’s preference was to adopt a policy that allowed for flexibility above all else. With that in mind, OPERS instituted a hybrid work environment that requires a minimum presence of staff working in the office two days per week. Adoption of this policy has been quite successful, with some staff continuing to work up to 100% on-site due to preference or workload. We have adapted a number of conference rooms with virtual conferencing equipment and combined with the use of Teams/Zoom, productive meetings continue with participants both onsite and remote.

We periodically publish suggestions for success in managing remote teams and maintaining digital environment etiquette. As time passes since the height of the pandemic and we adjust to co-existing with COVID in a slightly different manner, our work culture continues to adapt to the new normal as well. The focus has shifted to addressing the challenges of the labor shortage and economic conditions in 2022.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

Post Pandemic after implementing precautionary measures, OPERS resumed in house counseling sessions and at the end of the 2nd quarter 2022, resumed in person seminars for members who are eligible to retire within 5 years. Several new webinars were introduced: “Funding Pension and Health Care” “Understanding the Value of Your OPERS Retirement” and a segment in the Financial Wellness series: “Health care: The Hidden Cost in Retirement.” Marketing efforts include targeted weekly email blasts based on what stage the member is in their career and where they reside. The email includes a short 2-minute video reminding members of important topics and dates and are recorded by associates in the Member Services Center.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Virtual Meetings

Governor Mike DeWine signed Substitute House Bill 51, which went into effect immediately on February 9, 2022. The bill re-instituted a limited-time exception to holding public meetings in person. The bill, which temporarily permits public bodies to meet virtually, was passed on an emergency basis.

Since February, many state entities have been conducting meetings via teleconference or videoconference, which are considered “in person” for purposes of the Open Meetings Act.

Beginning July 1, 2022, public entities (including OPERS) will be required to meet in person unless a specific exemption exists in state law.

Remote Work Impacts Local Income Tax Accounting

House Bill 110 (State Budget Bill) altered how OPERS recorded payroll for purposes of accounting for local income taxes for associates who work more than 20 days from home. It allowed employers to record the office headquarters as the place of employment through December 31, 2021 and modified a temporary rule that had governed the municipal income taxation of employees who were working at a temporary worksite – including their home – due to the COVID-19 pandemic. The temporary rule expired on July 18, 2021. Under the reinstated temporary rule, if an individual had to work at a temporary worksite because of the pandemic, that employee was still considered to be working at his or her regular place of employment, or principal place of work. This treatment affected which municipality the employer withheld income taxes, which municipality may tax the employee’s pay, and whether and how much of the employer’s own income was subject to a municipality’s income tax.

As a result of this legislation municipalities are required to approve a nonresident employee’s request for a refund of taxes withheld on and after January 1, 2021, under the temporary rule, provided the income was earned while the employee was not actually working in that municipality for which taxes were withheld.¹

Starting with the first pay in 2022, OPERS incorporated into its payroll system a tracking mechanism for recording remote work locations versus the headquarters. We are required to withhold and remit local taxes based on individuals’ remote work tax location, which is captured as their home address on record. All other local tax withholdings will continue to be withheld for the city of Columbus.

System Governance

Initiatives conducted by your board(s) and other changes pertaining to the way your board(s) functions; changes to the structure of your board(s); changes made to your system’s top management positions.

OPERS’ 11-member Board remained complete during 2021 but experienced a few changes to members. In early 2021, two appointed members were replaced by their appointing authorities, following the end of their appointment terms. Additionally, in early 2021 a new interim director of the Ohio Department of Administrative Services was named, resulting in one Board member replacement. Subsequently, a different permanent director was named, resulting in another board turnover. Seven Board members are elected to four-year terms by the specific stakeholder group each represents: county employees; miscellaneous employees; college/university employees; state employees; municipal employees; and two retiree representatives. Three of these positions were up for election in 2021 and four seats will be up for election in 2022. Two of the seats up for election in 2021 resulted in no changes to the members (one unopposed and one won re-election). The third seat did not

¹ Ohio Legislative Service Commission, H.B. 110 (134th General Assembly), Final Analysis, Page 447

receive any qualified candidates, was therefore declared vacant in early 2022 and was filled by the remaining trustees in March 2022, resulting in one member change. Three individuals with investment expertise are appointed by Ohio's Governor, Treasurer, and by the Ohio Legislature (Speaker of the House and Senate President, jointly). The Board is completed by the Director of the Ohio Department of Administrative Services who serves on the Board by virtue of office.

Throughout 2018, 2019 and 2020, the Board engaged a governance consultant to identify efficiencies in the Board/committee structure, resulting in reduced redundancies and the elimination of some standing committees. The Board has continued work with its consultant, assessing how the current reduced committee structure meets its governance needs. This work continued into 2021. During 2021, the board consultant retired. In early 2022, the Board engaged a new consultant to refresh the work of the prior consultant and work with the Board to coalesce around a set of operative guiding principles.

The Ohio legislative council that provides oversight for state public pension funds engaged a firm to conduct a fiduciary audit of OPERS in 2017. The council is charged with conducting such audits of each fund at least every 10 years. The audit commenced in late 2017 and was completed with a final report to the Board in 2020. Staff and the Board continue to work through implementation and resolution of the recommendations made in the audit through 2021 and into 2022.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Infrastructure

OPERS employs a centralized IT model with an internally provided computing infrastructure that is beginning to incorporate cloud capabilities and offerings. Our digital workplace environment is primarily built around a Microsoft architecture including Windows, and Office 365. OPERS operates two data centers with one designated as primary and the other for disaster recovery purposes. Critical data is being replicated in near real-time.

OPERS' application portfolio can be categorized as core pension line-of-business applications, investment applications, administrative applications, and personal productivity applications. The pension line-of-business applications are custom developed while the other three categories are primarily package and/or SaaS solutions.

A more detailed description of OPERS technology environment follows:

- OPERS' computing platform is comprised of Windows 10 desktops, IBM mainframes (zOS), and Windows/Linux Intel servers. A multi-year initiative is underway to retire the IBM mainframes and DB2 database management system. The strategy employs a "change data capture" solution by tcVision that provides bi-directional database synchronization that allows for incremental code conversion and migration to SQL Server running on Linux x86 servers.

Systems and some desktops are virtualized with VMware and IBM's zVM. The network infrastructure is a combination of Cisco at the core and Juniper on the edge and is currently being redesigned as a spine and leaf architecture. Data Center storage is a mix of IBM, EMC, NetApp and Pure.

- Microsoft Office 2016/Office 365 provides personal productivity functions. Outlook and Exchange are used for email services combined with Symantec's Enterprise Vault for email archiving and legal discovery. OPERS employs a loosely coupled, service-oriented architecture infrastructure via an IBM WebSphere (migrating towards Liberty) and RabbitMQ middleware stack with DB2 and Microsoft SQL-Server providing the database layer. Smart Communications in the cloud provides correspondence development and management functionality. Opswise is used for enterprise job scheduling and Cherwell for IT Service Management.

- The IT security program employs a “defense in depth” philosophy and includes perimeter defense, intrusion prevention and detection, data loss prevention, anti-malware, web filtering, white listing, IT risk management, and SOA infrastructure security mechanisms. Endpoint protection expansion is underway.

Application Solutions

- The OPERS investment functions are supported by several commercial packages, both onsite and in the cloud. The Charles River and Bloomberg AIM order management systems handle trading activity domestically and internationally. eFront Frontinvest is used to manage private equity and real estate deals. The system also handles cash management and hedge funds. Reconciliation and investment accounting functions are provided by SimCorp Dimension SaaS. BarraOne provides a multi-asset risk management system. Blackrock’s Aladdin SaaS was recently implemented for fixed income management.
- Our line-of-business solution uses an IBM WebSphere and Java loosely coupled service architecture. The solution incorporates a common user interface, 360-degree view of the customer, numerous self-service features, and several retirement types.
- Envision document repository and workflow solution houses over 55 million images associated with member and pension processing.
- A Kronos human capital management system (HCM) supports payroll and HR functions. Microsoft Great Plains and Questica budget management systems are utilized for financial purposes. In addition, Taleo, eLearning.com, and TrakStar software-as-a-service provide support for recruiting, staff development, and employee performance review respectively.
- The OPERS internal portal intranet application runs on Microsoft Sharepoint.
- The growth of a Business Intelligence and Analytics program continues and is based upon Tableau and a curated data lake platform.

Section5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

With the goal of extending the solvency of the health care fund, the OPERS Board approved significant changes in the delivery of health care for pre-Medicare retirees effective January 1, 2022. The new model will replace the long-standing group plan with a Health Reimbursement Arrangement (HRA) model funded by OPERS through monthly allowances to retirees. The HRA model allows retirees the opportunity to select and fund an individual health plan most suitable to their needs. This model, in many forms, replicates the current model provided to over 100,000 Medicare retirees.

Extensive education and communication efforts were underway during 2021 to ensure our members and retirees were prepared to transition to our new health care model. Nearly 30,000 pre-Medicare retirees were impacted by the changes.

The health care program changes resulted in a significant improvement in funding status. The current health care fund is expected to last 25 years and has a funded ratio of 110.4% (an improvement from 11 years).

- ☐ Since January 1, 2003, OPERS has administered two defined contribution plans (Member-Directed Plan & Combined Plan).
- ☐ The OPERS Board, an 11-member body of elected and appointed members, governs the plans.
- ☐ The OPERS DC plans are 401(a) plans that are available as options for new OPERS members.
- ☐ 16 investment options are available to members in the OPERS DC plans along with a self-directed brokerage account (SDBA).
- ☐ 16,221 members in the Member-Directed Plan and 10,246 members in the Combined Plan (as of December 31, 2021).
- ☐ \$1.7 billion in the Member-Directed DC accounts and \$861.8 million in the Combined Plan DC accounts (as of December 31, 2021).

Board-approved changes to the Member-Directed and Combined Plans took place in January 2022. The most notable is that new members after that date no longer have the option of selecting the Combined Plan.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

- ☐ Online Account Security
- ☐ Recruitment & Retention, including part time
- ☐ Work model for contact center associates



State Teachers Retirement System of Ohio (STRSOhio)



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
200,187	156,093	155,897	489	\$89 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

STRS Ohio has returned to the office in a hybrid model. Associates may work remotely two days per week, mostly Tuesday and Wednesday with variations based on department needs, and in the office the rest of the week. Associates are beginning to become accustomed to being back in the office. Recruiting for open positions has been challenging, it is difficult to find qualified people to fill open positions.

Counseling and group education meetings take place virtually (through teleconference, videoconference, or webinar) and in-person. Overall, members seem to prefer the virtual counseling meetings (70%) and it's split about 50/50 for group education meetings for attending a webinar vs in-person meeting.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

STRS Ohio provides group education programs for different stages of a member's career. Post-retirement programs are also offered to retirees including meetings for health care coverage, and various rotating topics such as estate planning, cybersecurity, identity theft and long-term care. A series of meetings is also offered for active teachers. It is a series of topics including Social Security, Budgeting, Health Care in Retirement, Estate Planning and Supplemental Savings. All meetings are offered as webinars at this time. STRS Ohio utilizes short video tutorials on our website to educate members about specialized topics.

One-on-one benefits counseling sessions are offered through teleconference, videoconference, and in-person. STRS Ohio recommends an individual counseling appointment for members at least twice as they approach retirement; within three years of retirement and within the last year prior to retirement. We strive to counsel at least 95% of members within three years of their retirement date.

Web and print media are also key components of our education strategy. The STRS Ohio website provides education on every topic and members can conduct most business transactions via the web.

Post-pandemic, we continue to encourage members to use online resources, such as webinars, videoconference and all the tools available the secure online personal account. Services are convenient and, in many cases, faster than traditional methods.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

There are currently no new legislative initiatives pending for STRS Ohio. This spring, the STRS Ohio Retirement Board took action to pay a one-time 3% COLA to eligible benefit recipients. In 2017, the board permanently reduced the COLA for all benefit recipients from 2% to 0%. The board also approved a change in service retirement eligibility. They voted to eliminate the age 60 requirement for age and service eligibility that was set to take effect in August 2026. With this change the final change to the phased-in age and service requirements will be made Aug. 1, 2023, when 35 years of service will be requirement for an unreduced retirement.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Members can conduct most transactions online in their self-service account including service retirement application, withdrawal application, beneficiary changes, address/contact changes, add Medicare information, schedule appointments, update direct deposit, change tax withholding, reset passwords, and opt out of certain paper correspondence. New members can also make their initial plan selection online, they have the option to choose the Defined Benefit, Defined Contribution or Combined plan. Beneficiaries can apply for benefits and death reports can be made online. Members can also make add or make changes to the health care coverage and dental and vision coverage.

Members can attend a counseling appointment through videoconference or teleconference and group meetings are held through webinars.

STRS Ohio is on social media using Facebook, LinkedIn, and Twitter. STRS Ohio also provides 15 different videos and conducted 56 live webinars that were attended by about 4,600 members. On the security side, STRS Ohio uses multi-factor authentication on the self-service sites. This is required in addition to a username and password.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

This year the member Annual Statement of Account was delivered through electronic notification to all members with email addresses instead of mailing paper forms. In the past, we mailed approximately 210,000 paper statements and this year only 57,000 were mailed, over 200,000 email notices were sent; the statement is available in the secure self-service account.

We are working on development of additional informational videos for the website. The videos will be short presentations about very specific topics to aid members in gathering information.

This month we be implementing changes to tax withholding due to the new IRS W4-P requirements. All self-service applications and paper forms have been revised for this change.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$) as of 6/30/21
30,000	36,700	6,500	57	12.5 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Most staff have chosen to continue to work from home. There are a few staff members who rotate days in the office to perform physical tasks like processing mail and meeting with members. Our contact center staff rotate weekly in the office vs remote provide coverage for the reception desk.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We offer a Pre-Retirement Seminar on a regular basis. This seminar guides members through the retirement process and describes eligibility requirements and benefit calculations. This year we re-introduced in-person seminars; however, the webinar remains the most popular format. We are looking to expand our offerings in the new year to provide more foundation education on financial and retirement planning. We also hope to provide better education for participants in our new DC plan. We expect these programs will need to be different in format than our pre-pandemic offerings to provide consistency between our in-person and virtual experiences. We currently only target communications to active vs retired member groups.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Legislation passed this year expanded the types of military service that can be purchased. Previously military service was limited to specific periods of war in specific regions. The new law allows the purchase of most active military duty, regardless of wartime status.

This year there was an increased buzz and interest in legislation to close the newer DC plan and reopen the DB plan to State employees. The bill didn't make it out of committee.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We interact with members through regular mailings (annual statements and bi-annual newsletters), by providing information on our website, over the phone and through seminars both in-person and webinar. Members can also schedule an appointment for a one-on-one office visit.

We have begun providing self-service opportunities by offering most forms digitally online. We also just launched a digital retirement application process. Members completing the digital application will receive communications from us by email.

In the new year, we expect the launch the beginnings of a member portal. This first phase will give members access to select documents in their file.

We would also like to add social media to our communication offerings. We are curious to hear about other systems' experience in the area, best practices and how the various platforms are used. We are also exploring other ways to interact with members including counseling services.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We recently launched a digital retirement application process. This process allows members to complete the retirement application, several forms and submit documents online. OPERS will then communicate with the retiring member by email to provide updates. Employers submit required information through an employer portal.

We are in the beginning stages of relaunching a survey program to better understand our membership and their needs. We hope to learn how to target specific groups to provide the communication, education and other resources that best meet their needs.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

What types of financial/retirement planning assistance or education do other systems provide, specifically for DC plans?

Do other systems have survey programs, how frequently do they survey, and what have they learned from their survey feedback?

Contact Center Metrics – What metrics are other systems measuring to help track the business being handled and how can these metrics help us become more proactive in our communication?

Call Monitoring - What kind of call monitoring takes place in other retirement system Contact Centers? How frequently are calls monitored? When monitoring calls, does the monitor find it more beneficial to listen to active calls or recordings of a previous interactions? What industry related standards should be monitored in these calls? (Aside from the member experience and the knowledge of the representative.)

Digital Age – How do we make online functions more appealing to our current Retirees? This is the group of members that we struggle with the most when it comes to completing online functions or communicating electronically.



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
180,098	156,500	48,384	423	\$86.3 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

The pandemic threw Member Services into the spotlight, even as the customer service industry itself faced challenges alongside the rest of the world. When offices closed and in-person services halted, the demand for virtual service and phone service became the focus. But as the pandemic began to subside and the dust settled, we moved from survival mode to preparing for the future and adjusting to changes and trends in the post-Covid world. One benefit we had going into the pandemic was that we already had a small team of 5 Member Services staff who were willing (and requesting) to continue working on-site to support the staff we had working remotely (I.e., for processing incoming forms and documents from members, receiving and documenting purchase payments timely and printing services for staff). However, we still had to adapt to handle the service expectations of our members and retirees. For example, we saw an increased volume of calls, emails, online inquiries, and requests for remote education and counseling services.

Post-pandemic, we now focus on the fundamentals: care and connection with our members **and** employees. Although our office reopened May 1, 2022, we continued offering alternatives to our members for whatever service they needed. We still offered both remote and in-person education sessions and retirement application assistance sessions, we kept our drop-box open in the front of the building for members to submit their applications/purchases/forms to PERS and worked to build and promote more self-service options and alternatives for members/retirees. Employees were given a choice to return to in-office work either part-time or full-time, or to continue working from home full-time. We installed a plexiglass barrier around our Reception desk, for the protection of our staff and members, and we continue focusing on preparing forms packets and having things pre-prepared for members once they do come into the building, to ensure faster service and a better customer experience.

By maintaining digital and remote services for members, we are realizing a budget savings from additional expenses we had pre-pandemic, like mileage reimbursements, agency car usage, office supplies, etc. In fact, we had so many staff elect to continue working remotely post-pandemic, we were able to consolidate two buildings into one and now all staff are located at our HQ building. This was a major budget savings for the agency.

The Great Resignation did impact our agency to some degree. We do our best to prioritize employee experience to avoid burnout (I.e., sharing member kudos, allowing flex schedules, cross-training staff to shift or re-organize workload, etc.), and we are investing in technology (through our “Modernization” efforts and project) to automate as much as possible.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

OPERS offers a variety of educational resources for members at various stages of their career. New Members, Active Members, Retired Members through Seminars, Webinars, Recorded Presentations

Financial wellness initiative

We have continued to progress in our quest to engage our active members through financial wellness education. Our education now includes two modules; “Bridging the Gap to Retirement” and “Personal Budgeting.” Both modules offer an online tool to assist members in putting into practice what they learn in the webinars. We are currently developing our third module on savings and investments, as well as ramping up our marketing via email, employers and social media.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

SB 1049 was signed into law by the governor on June 11, 2019. The challenge for PERS has been to not only implement this bill, but also continue to provide our members and employers with uninterrupted service, while working through the intricacies of implementing SB 1049. The Agency developed an overall implementation approach to tackle each element of SB 1049.

This approach is to manage this as one, comprehensive program with the following five individual projects:

Project Effective Date Employer Programs

Salary Limit

Work After Retirement

Member Redirect

Member Choice

As of June 30, 2021, PERS fully closed the Employer Programs and Salary Limit projects. The Member Choice project was closed in August 2021. The Work After Retirement project was completed in March 2022 and the Member Redirect project has an expected completion date of April 2024. PERS also initiated a new project, Technical Debt, to address some technical debt issues that arose as a result of project implementations. PERS received funding for these projects for the 2021–2023 biennia.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Infrastructure

OPERS employs a centralized IT model with an internally provided computing infrastructure that is beginning to incorporate cloud capabilities and offerings. Our digital workplace environment is primarily built around a Microsoft architecture including Windows, SharePoint, and Office. OPERS operates two data centers with one designated as primary and the other for disaster recovery purposes. Critical data is being replicated in near real-time. The same facility provides end-user workspace as part of our Business Continuity Plan.

OPERS' application portfolio can be categorized as core pension line-of-business applications, investment applications, administrative applications, and personal productivity applications. The pension line-of-business applications are custom developed while the other three categories are primarily package and/or SaaS solutions.

We do employ the use of our Online Member Services (OMS) program, which was heavily used by our members/retirees throughout the pandemic – and continues to be a great self-service tool and resource.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

In addition to a multi-year effort to ‘modernize,’ we have smaller efforts underway, to improve what we have, until we do reach our goal of ‘modernization.

Topic-specific education videos. We are creating and adding short, animated, topic-specific videos to our education content. Our program is extremely complex, and presentations can be up to two hours long. Providing short, specific content, on things like ‘withdrawals, options, steps to retire, etc.’ we are better meeting the different learning needs of our membership.

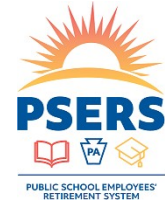
SRA ‘trigger messages.’ - When members turn in their retirement application, a ‘black hole’ of no information presents. The process to complete an SRA on our end can, by law, take up to 92 days. That timeframe results in a large # of ‘status calls.’ These calls contribute to our long wait times and queues. We have added automatic communication into our workflows, to notify members when their application moves from Intake to Calculations. A small step, but part of a larger effort to better inform along the way, members to their retirement status.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Would like to talk with others about how email correspondence is handled within other systems. Topics of interest are tracking, assigning work and secure methods of responding.



Pennsylvania - Public School Employees' Retirement System



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
248,091	242,839		273 System 63 Investment	\$74 billion

Section 1: **Post Pandemic Impact** – Please describe your return to office and, staffing, on premises vs. remote work, etc.

After more than two years of emergency telework, PA PSERS implemented Permanent Telework, under the Commonwealth's enterprise policy effective April 2022. PA PSERS Permanent Telework is guided by specific, line of business guidance and expectations with respect to office presence, accountability, use of online platforms, and an expectation of continuous review and improvement. All PSERS employees who are teleworking can come into the physical office every week on certain days, once a month, once a quarter, or as dictated by operational needs. This is left to the discretion of each individual business area. Within the Bureau of Communications and Counseling, whole departments are mandated to be in the office together one day a week, and the rest of the week has staff in the office (both in HQ and remote regional offices) on a rotating basis to handle walk-in coverage on a daily basis.

While telework can provide positive impact on PSERS' ability to recruit and retain employees, telework remains a privilege, not a right or guaranteed employee benefit. As such, employees must retain a Pennsylvania residence and cannot telework out of state.

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

PSERS employers are not a primary medium for educating PSERS members regarding their retirement benefits. PSERS Foundations For Your Future (FFYF) seminars are designed to give public school employees an overview of their retirement benefits. These seminars provide all active members with general information about PSERS' benefits and services. Attendance at a FFYF seminar is for any member regardless of where they are at in their career. Each seminar lasts approximately 90 minutes. Attendance at these sessions can range from 25 to more than 100 persons. A copy of the presentation and recorded segments of it are available on the PSERS website as well. This had been on hold through the pandemic but is once again in-person. Beginning in 2023 this will also be offered virtually.

Retirement exit counseling is offered as a service to anyone retiring in the current school year. These are small group sessions consisting of 8 – 10 individuals. These sessions are not mandatory for retirement though. It is highly recommended that members attend a large group educational session (Foundations For Your Future Program or FFYF) during the year they plan to retire and prior to the Exit Counseling Session. Emphasis at Exit Counseling will be on completion of the retirement application and related forms, understanding the retirement estimate, and additional retirement related information. The exit counseling sessions are scheduled to accommodate a small group. Individual retirement exit counseling is also provided but only to disability applicants. Through the pandemic these changed from only being in-person to only being online but since the fall of 2021 these are offered in-person or virtually.

PSERS has piloted targeted presentations and communication efforts to new members of the system, particularly in regards to the decisions they need to make within a limited timeframe. These were all conducted virtually. Small group sessions were not well attended and discontinued. Personalized one on one sessions continue to be piloted and evaluated for possible future expansion.

PSERS also conducts various targeted messages to all members based on unique circumstances (not age based): no online account, not having paperless delivery, no beneficiaries on file, invalid email or addresses, changes to marital status reminders, 100th birthday letters, etc.

There is also a targeted communications calendar established each year for Defined Contribution participants. The focus of this program is to educate and engage with the participants to encourage them to take an active role in preparing for retirement. Most of the yearly campaign is focused on monthly email solicitations and the development of new resource materials with some additional inserts with quarterly statements.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

On Dec. 17, 2021, Pennsylvania Gov. Tom Wolf signed into law Act 91 of 2021 (House Bill 412). The act seeks to alleviate the shortage of classroom personnel by making it easier for PSERS annuitants and others to become day-to-day substitute teachers during the 2021-22 and 2022-23 school years without jeopardizing their pension.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

PSERS provides three newsletters a year which are delivered based on their delivery preference. Members receive either a 1099-R or a statement of account annually. There are targeted email blasts to all members and members of the DC plan also receive monthly emails with targeted messaging. As of September 2019, we are using Twitter and in 2020 Facebook but still continue to not use online chat. There are some recorded presentations and educational videos available online for members and a recorded presentation to be shown on-demand at school benefit fairs. PSERS offers its small group retirement exit counseling and individual disability counseling sessions via webinar and in-person. Our large group educational sessions continue to be in-person and in 2023 will also be available via webinar. Recordings of each of these are available online.

We offer a Member Self-Service Portal that allows active and retired members to manage and update their personal information (phone numbers, email and mailing addresses), nominate beneficiaries, elect membership class and multiple service, waive membership, create estimates, view account summaries, create income verifications, statements of account, staff-prepared estimates, 1099-Rs, calculate or change federal withholding tax, enroll in or opt out of paperless delivery, view disbursements, receive targeted alerts and messages, and receive and view correspondence. This past year we added an online status tracker for estimates, refund, and retirement requests. We are in the process of adding online functionality to enable members to update their banking information online and submit their refund or retirement applications.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

PSERS' revised its disability review process by requesting applicant approval for PSERS to communicate directly with their physicians in an effort to expedite reviews and increase the ease of the disability application and renewal process. We have also begun to call and conduct follow-up emails to disability annuitants who missed key disability deadlines.

This past year PSERS has piloted targeted presentations and communication efforts to new members of the system, particularly in regards to the decisions they need to make within a limited timeframe. These were all conducted virtually. Small group sessions were not well participated and discontinued. Personalized one on one sessions continue to be piloted and evaluated for possible future expansion.

Efforts are underway to add additional services to the Member Self-Service portal to enable members to update their direct deposit information and submit retirement or refund applications online. PSERS is bringing some back-office functions in-house with PSERS rather than the third-party administrator for the DC Plan, namely the reporting of salary data by employers. This effort will require a change to the frequency of employer reporting of salary for the defined benefit (DB) plan from monthly to per payroll to align with the current defined contribution (DC) plan reporting.

We are in the process of completely redesigning the materials mailed to new members.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

- How has the submission of online applications impacted other systems and what pitfalls have been experienced or lessons learned through the implementation of these online applications?
- Any long-term changes to regional office structure or communications and counseling programs
- Successes / pitfalls in communicating hybrid/DC plans information
- Success in targeted messaging campaigns – new members, transactional, etc.
- Call center management tips, use of workforce optimization, etc.



South Dakota Retirement System



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
41,878	32,348	23,604	33	14.1B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Operations at SDRS are back to pre-pandemic status, however some member and employer interactions will continue to be offered in a virtual or hybrid format as well. All system staff have returned to the office full-time with flexibility for remote work, if needed. In-person member appointments began in early 2021 and we continue to travel to locations throughout the state to offer these important personal consultations as well as offer virtual appointments to provide an additional service to reach our members. Member seminars and employer requested visits began July 2021 with overwhelming interest and success. Safety protocols, such as barriers between members and counselors continue to be offered to members.

Members and staff have all recognized a preference for in-person interaction. However, through the pandemic we expanded our virtual capabilities and will continue to provide opportunities for members and employers to interact with staff virtually when it is more convenient than in-person. Employer representatives preferred the virtual trainings, so these remain virtual to eliminate travel time for both the employer representatives and staff and have resulted in greater participation.

In June 2021, the SDRS Board of Trustees met in person for the first time since December 2019. Trustees and staff all appreciated the chance to reconnect and recognized the value of informal interactions in addition to the formal agenda item discussions. We continue to offer a hybrid feature for our board meetings for those board members that may have challenges in attending meetings in person.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

- **Individual counseling sessions** – Personalized, one-on-one counseling sessions offered at neutral sites statewide. Counseling sessions are held both during and after work hours. SDRS is traveling again throughout the state offering individual consultations with safety precautions in place. SDRS is utilizing Microsoft Teams to offer online counseling as well.
- **In-house counseling sessions** – One-on-one counseling during SDRS office hours at the member’s convenience. The member may call to schedule an appointment or walk-in to the office to meet with a retirement planner. SDRS is now open for walk-ins with safety precautions in place.
- **Telephone consultations** – A toll-free number is available for members to call in to speak with retirement planners for personal consultations during normal business hours. SDRS is now offering telephone consultations by appointment during normal business hours as well as extended hours several days a week.
- **SDRS website** – Provides members with access to personal account information and member forms through the secure MySDRS site. The public website offers publications and employer forms, calculators, event registrations, etc.
- **Pre-Retirement workshop** – Provides a general overview of SDRS, Supplemental Retirement Plan (SRP), Special Pay Plan (SPP), and Social Security. Offers members nearing retirement the opportunity to expand on income management skills and raises awareness of the many challenges facing retirees. (2.5 hours in length)
- **Early and Mid-Career workshop** – Target audience is members in the early and middle stages of their careers. Offers a wide-ranging spectrum of money-related topics to promote personal financial awareness and increase retirement preparedness through budgeting and financial planning. (2 hours in length)
- **Women and Financial Planning workshop** – Designed to increase awareness about the unique challenge’s women face during their careers and throughout retirement. (2 hours in length)
- **Retiree “Coffee Talk” forum** – A continuing education program keeping retirees informed on legislative bills, benefits, COLA, etc.
- **Virtual individual consultations, workshops, and seminars** – Provide virtual platform as an additional option for members to participate in all our educational services.
- **Other** – Employer requested visits providing presentations and/or consultations at employer place of business, Personal Benefits Statement, Outlook and Update newsletters.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

No significant legislation was approved during the last Legislative Session.

South Dakota, much like the rest of the country, is experiencing workforce shortages. In the 2022 Legislative Session, a bill was introduced that would have made significant changes to our retirement and reemployment provisions, providing a windfall to members and savings to employers while increasing the liabilities of the system which would be borne by the retirees as a result of our flexible COLA benefit. SDRS was successful in defeating this bill in committee. We anticipate that retirement and reemployment will be a topic during the upcoming 2023 Legislative Session.

Current inflation is a concern for SDRS; however, providing a COLA that equals inflation is not affordable during high inflationary periods based on our fixed-contribution design. Our COLA design provides for a COLA range from 0% to 3.5% and is based on affordability and the current rate of inflation, ultimately maintaining 100% funded status for the system. The board has heard from a retiree group asking that SDRS provide a COLA that keeps pace with inflation even during high inflationary periods. Based on these requests, we anticipate that the COLA may be a topic of discussion during the upcoming 2023 Legislative Session.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

- **Pension Administration System** – SDRS completed the initial phase of the restructure of our Pension Administration System in 2019. We continue our efforts to add more functionality to improve our efficiencies.
- **Email** – SDRS utilizes email to provide members with newsletters, surveys, educational materials, etc.
- **MySDRS** – Secure, members-only section of the SDRS website. Members can access and review personal information, calculate benefit estimates, and purchase costs, and more. Limited self-service. SDRS is currently in the final phase of a redesign of the website to improve our self-service options.
- **Facebook** – The SDRS Facebook page was designed to share important educational topics, travel schedule, system news, etc. SDRS is currently considering Twitter as another form of communication.
- **SDRS E-News** – Developed to provide members with information on upcoming board meeting agenda, pension design, sustainability, retirement topics, late-breaking news, etc.
- **Newsletters** – Publications used to educate members and employer units regarding various topics. Newsletters include: Outlook newsletter sent to all members, Update newsletter sent to employer units, new member welcome newsletter, and an e-newsletter sent to all members with an email on file with SDRS prior to upcoming board meetings.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

- **Web videos** – Once website redesign is complete, SDRS plans to create and launch web videos on a variety of topics.
- **Website** – We are currently working on a redesign of our website. The website redesign will focus on the following areas: freshening the overall aesthetics of the website, improving the user experience, and offering more tools and resources for members' retirement readiness. Cybersecurity continues to be an area of emphasis and we will be working with the state Bureau of Information and Technology over the next several months to move the SDRS website within the State's Business to Client platform. This platform adds another layer of security to our website while consolidating the connections to state agency websites in one location.
- **Electronic Forms** – The new website will include the ability to fill out forms and electronically sign forms. These forms will be interfaced with our current pension administration system.
- **Communications** – Currently working on a strategic plan to add value to our member communications including newsletters, email, workshops, seminars, brochures, etc.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

- **Member self-service** – Upon the completion of our new website, SDRS will consider more opportunity for member self-service. Interested in learning more on this.
- **Member engagement and communications** – In the next few years, SDRS will focus on the member experience. Looking for ways to improve all forms of communications (i.e. - workshops, seminars, publications, newsletters, statements, estimates, etc.)
- **Retirement planning tools** – Interested in learning what systems are using to assist their members in comprehensive retirement planning and to what level this service is provided.
- **Cybersecurity** – This continues to be a vital topic considering the variety of threats we face today,
- **Web counseling and webinars** – Began offering these online options during the pandemic, we are looking for ways to continue to improve these services, so excited to hear other systems experience and overall services provided.



Employees' Retirement Fund of the City of Dallas



Employees' Retirement Fund
of the City of DALLAS®

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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
7,841	7,385	1,981	42	\$3.6 Billion

Section 1: **Post Pandemic Impact** – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Dallas ERF continues to work in a hybrid situation, with staff working from home and coming into the office several times a week. The pandemic was a difficult situation that brought about some positive change. The hybrid schedule yields a more productive environment in that more services can be provided to members. Eliminating a commute and office interruptions gives members and staff more flexibility.

Section 2: **Member Education** – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

ERF continues to conduct pre-retirement webinars virtually using webinars. Employees prefer the flexibility of webinars then in-person meetings. Due to space restraints, we'd have about 42- 45 employees in a Pre-Retirement seminar. On average, over one hundred employees register for our webinars, with more than half showing up for the webinar. Members like that the webinars are recorded, and they receive an email after the webinar whether they attended or not. Two in-person pre-retirement meetings are scheduled in 2023 to gauge the interest in the future of in-person events. Our hypothesis is that younger members like Generation X & millennials (combined these groups represent 82% of the employee population) prefer online to in-person meetings.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

There are currently no legislative changes that would affect the pension. We do, however, have a pending legal matter. The City of Dallas is suing the pension fund to impose term limits on three-member elected board seats. The Fund agrees with term limits. The Fund disagrees with the method the City uses to set these limits. According to the Fund's governing document, Chapter 40A of the City Code, no change shall occur to the Fund unless three things happen. 1. Agreement by the ERF Board of Trustees 2. Agreement by the City Council 3. The change must be put on the ballot for the citizens of Dallas to vote up or down. The City is suing to forego the above provision in the code. The City of Dallas first implemented these changes to all City boards in 2017 and decided to sue the Fund when City officials were reminded that the procedure in Chapter 40A should be followed. The case is now with the Texas Supreme Court and leaves all three board seats in a holding pattern until the issue is resolved.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

In 2020 ERF upgraded the secure member portal from the one built in-house by Communications and IT in 2015 to a portal using the vendor VITECH. The portal offers features like an improved pension estimator, the ability for members to upload their forms, view and notarize ERF documents, and more. ERF has had a social media presence since October 2016, with Facebook and Twitter. To like us on Facebook, type in @DallasERF and follow us on Twitter.com/DallasERF. Retirement counselors provide counseling by phone.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

The Communications team recently hired a tri-lingual employee. This new person has translated all forms on the Spanish ERF site and will provide Spanish subtitles to current pension education videos. The Fund will now be able to provide pension education in Spanish. The City of Dallas employee population is over 28% Hispanic or Latino. We are not sure how much of that population recognizes English as a second language. We will monitor our Spanish initiative's analytics to gauge the impact.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

How else is everyone communicating benefits after the pandemic? Have you all made any significant changes that you have kept? How many have gone back to pre-pandemic procedures? Have you implemented new communications procedures with old strategies?



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Communications Contact		Title	Phone #	Email Address
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Member Education Contact		Title	Phone #	Email Address
Kathryn Tesar		Director, Benefits Communications	512-867-7396	kathryn.tesar@ers.texas.gov
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
282,554	121,099		327	34.9 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Implemented an automated workflow and electronic signature solution to execute and manage legal agreements, personnel files and other documentation more efficiently.

Dedicated COVID testing site and free testing materials as part of continuing COVID protocols

Permanent switch to hybrid work schedule with employees expected to spend part of their work week in office

Coordinated the following virtual activities to keep staff engaged while working remotely:

- New Hire On-Boarding,
- New Temporary/Contractor On-Boarding,
- New Employee Orientation,
- Monthly Brown Bag Lunches
- Facilitated and coordinated the first hybrid ERS Employee Service Awards Ceremony, and
- Friday Lunch Break activities

Section 2: *Member Education* – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

ERS provides education and communications in multiple ways, including the following:

- A comprehensive website, www.ers.texas.gov, with benefits information and access to a member portal that members can log into to see their specific account details
- Separate regular e-newsletters for: contributing members (monthly), retirees (quarterly; this is mailed to retirees' homes, in addition to being sent via email) and HR professionals at participating employers (biweekly)
- Benefits guides for new employees and retirement planning guides, both of which are available via hard copy (usually through the employer agency) and on the public website
- Regular and by-request seminars on retirement benefits and other topics; we offer these both in person and via webinar
- Individual retirement counseling offered over the phone, in person at ERS' offices and via online video conference
- A Facebook page on which we post regularly and respond to members' comments and questions. We also answer questions and offer limited support through Facebook Messenger.

During the pandemic, we temporarily suspended in-person seminars and increased webinars. We have since resumed in-person seminars, but our webinars continue to be popular.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

Fiscal Year 2022 is an interim year between legislative sessions for Texas, therefore, no new legislation has been passed. During a legislative interim, committees hold various hearings intended to gather research and policy background to prepare for the next legislative session in 2023. ERS has provided testimony on topics including the financial status of the pension plans administered by ERS, proxy voting, Russian investments and the impact of inflation on state employee retirement benefits.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Please see the answer to Section 3 above regarding regular member and retiree interactions.

Our online member portal, accessed through our public website, allows members to update their contact information and banking information (for direct deposit), begin the process to update beneficiaries, see information on their retirement eligibility and access their latest annual State of Retirement Benefits, among other actions.

The public website also allows members to create a retirement estimates, request the cost of purchasing service credit, schedule a meeting with a retirement counselor, and register for seminars and webinars.

Implemented Workiva to streamline the processes of compiling, reviewing and approving the Annual Comprehensive Financial Report

Completed Third Party Assessment of ERS Security Program Maturity

Continued enhancement of Disaster Recovery (DR) capabilities and new technology and updated Business Impact Assessment

Continued Data Quality and conditioning to prepare for Pension and Benefits System project. The Retirement and Insurance System (RISE) project is currently in the vendor evaluation phase, with an award expected in 2023

Continued Information Technology Service Management (ITSM) program with emphasis on asset management and configuration management

Expanded DevOps Agile Software Development Life Cycle to remaining application teams to support better responsiveness to changing business needs

Upgrade and process improvement applied to Investments Accounting

Expanded use of paperless and e-sign to multiple processes

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

In 2022, ERS implemented a new retirement benefit structure for Texas agency employees who start(ed) on or after Sept. 1, 2022. The new benefit is a cash-balance structure, with very different annuity calculations than the traditional pension benefit for employees who started before Sept. 1, 2022. We have had extensive communications about the new benefit, previously focused primarily on state agency HR professionals to help them prepare for the change and recruit new employees based on it. Communications to new employees are ongoing, with information in the new employee guide and on the website and, coming soon, in short videos. We are also working with large employing agencies to develop videos specifically for their employees.

In 2023, ERS will award a contract for a pension/insurance commercial off the shelf system for benefits administration.

ERS also has a robotics process automation project underway in 2023 to automate previously manual data entry work in the finance division.

We are currently working with an external web design firm to evaluate and redesign the main ERS website, with the goal of making it easier to navigate and keeping up with current web standards. Although we don't have a set schedule for website evaluation and redesign, we try to go through the process every four or five years.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
918,545	439,887	501,241	1,178	183.5B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

We have returned to a hybrid environment. The contact center is 100% remote and employer coaches are 100% remote. All other positions are hybrid and the number of days in office vary dependent on the role.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

TRS Developed a series of member education videos:

- Interactive Employment After Retirement Video
- Retirement Readiness/Early Career
- Mid Career includes a retirement income and expense worksheet
- Learn about TRS Services
- Understanding your Pension fund

The videos listed above are the newest videos on the TRS Website developed within the last year.

TRS Developed a Life Events Resource Kit for member and employers and will continue to add to or update that information.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The 2021 Legislative session authorized a one-time supplemental payment to retirees who retired on or before December 31, 2020. The payment was equal to the retiree's annuity amount or \$2,400, whichever was less. TRS issued over 430 thousand payments in January 2022, which amounted to over \$706 million. Changes were also made to Employment After Retirement statutes, most prominently a three strike/warning violation process was established. Employers were also prevented from passing TRS surcharges to the retirees.

The 2021 Legislature enacted legislation for TRS to reach out to members who had an account balance but were no longer earning interest due to their inactive account status. TRS created procedures to locate these members and send them a certified letter with information pertaining to their account. By December 2022, we will have mailed 154k certified letters. To lessen the impact on our processing teams, MyTRS has been utilized as a safe and secure manner for members to refund their account balance.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Web counseling sessions are available, and our current platform is Lifesize. We will be changing our platform to either Zoom or Teams before the end of the fiscal year. We find that members have gotten more comfortable with technology and have shifted their preference to video counseling sessions versus in-person.

TRS launched a new MyTRS experience in April 2022 that is directly integrated with our pension administration system. MyTRS allows members to access account information, run estimates, apply for refunds, apply for retirement, send secure messages, and view documents. Retirees can view annuity payment information, update withholding, send secure messages, and view documents. The new MyTRS also uses multifactor authentication and identity proofing during the registration process.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

- TRS will be opening its first regional office in El Paso.
- We are working on an initiative to streamline the automated phone line experience by consolidating menu options and identifying areas of improvement. This will provide a better member experience, ultimately making it quicker and easier for callers to select the appropriate menu options, better self-service options and speak with a counselor when necessary.
- We continue to look at ways to provide more functionality through MyTRS with the goal of reducing call volumes and repeat calls.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

TRS will be looking to implement chat as an additional communication channel for members. We would like to hear if any other systems use a real-time chat feature and what are the successes and/or lessons learned.

TRS is interested in hearing from other systems regarding security and control measures used in web self-service applications to ensure that only members are making updates. In addition, we would like to hear from other systems that use a 3rd party service to identity proof members during the registration process.



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Member Education Contact		Title	Phone #	Email Address	
Lisa Idais		Manager - Member Field Services	512-637-3341	lisaid@tcdrs.org	
# Active Members	# Retired Members	# Inactive Members	Staff Size		Assets (\$)
144,107	78,206	122,752	121		\$45B

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

TCDRS re-opened our offices on June 14, 2021. We continue to support a hybrid workforce. Most staff are working 2 days a week in the office. Less than 2% of the workforce is in the office 100% of the time.

Directors are generally responsible for and must approve remote schedules based on performance, job function, job duties, team activities, etc. Attendance may be required at the office for certain meetings, tasks and events.

We have provided our managers training on managing a hybrid workforce and have converted meeting spaces to Zoom rooms so that the experience will be seamless regardless of location. We are currently re-evaluating our office design and space to better meet our needs based on our new working arrangements.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We are continuing to offer our group webinars and individual counseling sessions virtually and in-person. Virtual services are more efficient and scalable.

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The following bills that impact TCDRS were signed into law during the 2021 session:

Senate Bill 13 - This bill prohibits Texas public pension plans from investing in or contracting with companies that boycott certain energy companies. Under SB 13, the Comptroller will prepare a list of such companies and send it to the Texas public pension plans for their review to determine if they are invested in any of the companies. If so, there are certain processes that must be followed and certain reports that must be made to the State leadership. In addition, SB 13 requires that certain contracts between a governmental entity and a company must include a contractual provision in which the company verifies that it does not boycott energy companies and will not boycott energy companies. The bill will become effective on Sept. 1, 2021.

Senate Bill 19 - This bill prohibits any Texas governmental agency from contracting with companies that discriminate against the firearm or ammunition industries. The bill does not provide for the compilation of a list of such companies but like SB 13, requires that the contract include a provision that the company does not and will not discriminate against the firearm or ammunition industries. The bill will become effective on Sept. 1, 2021.

House Bill 3898 - This bill makes amendments to a law passed several sessions ago that provides for each Texas public pension plan to have an outside firm conduct an evaluation of its investment practices and performance. The amendments do not materially affect TCDRS, which filed its initial report in compliance with existing law several years ago. In addition, the bill also amends state law concerning developing and revising a funding policy, but the amendments do not materially impact TCDRS. The bill will become effective on Sept. 1, 2021.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

TCDRS uses Pegasystems as our pension administration platform, which integrates business processes, workflow and business rules. FileNet is used for electronic document storage. Business data is stored in a SQL enterprise database. We have a custom website that uses Customizely for content management. The solution implemented allows us to adapt quickly to changing business demands, improve business process management, strengthen security and audit capabilities and take advantage of best-in-class solutions.

Some of our recent accomplishments and projects that are underway include:

CRM. Implemented a CRM tool within our Pega platform. For our call center, implementing this platform extension provided better information through a 360-degree view of the member, streamlined systems and tools that our call center needs to assist members, improved speed and performance; and automated communications such as contact update confirmations.

Co-Browse. Implemented a powerful tool that lets the call center reps see the members screen so that they may provide better web support.

Work Optimization. We have begun rolling out improved workflow management, expanded straight-through processing, and improved the performance of our pension administration system. These upgrades are providing processing efficiencies and improved service levels.

Personalized and faster digital experience. We continue to enhance the website to replace paper processes, enhance security and provide a more personalized digital experience. We have recently improved the sign-in experience; implemented a secure notifications center, provided additional document upload options, given members the ability to request name changes and service time online, and updated the technical design to prepare for additional website personalization.

Smart communications solution for creating, delivering, storing, and retrieving outbound communications. This solution focuses on managing and distributing personalized communications to improve security, controls, and customer engagement; providing efficiencies in the management and fulfillment of communications including on-demand, batch, print, and digital; and setting us up to better support a modern digital communications strategy.

Infrastructure security enhancements. This project is implementing additional infrastructure security to enhance our security layer and leverage new technologies to ensure our data is protected and possible attacks are prevented. The solution includes software to secure data in cloud-based applications; data loss prevention software to prevent data loss and leakage through detection of abnormal access to data or abnormal email exchange.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We are going paperless in 2023! This will allow us to better serve our members and employers with secure, fast, and convenient management of member accounts.

To support these efforts we have rolled out the ability to make account updates via the call center by providing electronic signature via DocuSign. This functionality is in addition to our robust website the allows members to manage their accounts and apply for retirement online.

In addition, we implemented Co-Browse, a powerful feature that lets call center representatives see exactly what customers see when providing technical support on the website. We are rolling out enhanced functionality on the website to replace processes that were paper-only, such as the ability to apply for certain types of service, make name changes and designate representatives.

We also provided employers with the ability to update beneficiaries and make other account changes on behalf of members. These processes provide electronic member signatures via DocuSign.

Finally, we have begun a communications campaign, Paper-Less is More, to prepare employers and members and generate excitement.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Security developments



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Member Education Contact		Title	Phone #	Email Address
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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
79,205	35,323	11,284	115	38 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

TMRS returned to the office gradually and has adopted a hybrid work schedule for a majority of positions.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

TMRS provides onsite education to Members. In addition, TMRS issues quarterly newsletters to both Members and Retirees.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

In 2021, TMRS had legislation passed that affected our return-to-work statutes. Retirees are now allowed to return to their retiring city after a one-year break without a forfeiture of their benefit

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

TMRS recently launched an online scheduling tool for Members (active and retired) to request a phone call, Zoom or in-person appointment. TMRS also has an app for Members to use and access their online account. TMRS is not on social media.

Section 5: New Initiatives – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

TMRS has revamped all communications in the last 2 years; from Member letters to onsite presentations. The new messaging is simple and concise.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

How are other systems dealing with employee turnover and employee training.



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Member Education Contact		Title	Phone #	Email Address	
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# Active Members	# Retired Members	# Inactive Members	Staff Size		Assets (\$)
107,000	75,000	62,000	180		45 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Our offices are now open to members for in-person visits. Most of the staff rotates working in the office and remotely.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We offer general and new hire presentations that are customized for each retirement system such as Noncontributory, Public Safety and Firefighters. In addition, we offer three types of seminars: Early to Mid-Career, Pre-Retirement, and Retiree seminars. We also conduct individual retirement planning sessions that provides customized advice on member's retirement benefits, savings plans, and investment options. Prior to the pandemic, our seminars and counseling sessions were conducted in-person. Now we offer both in-person and virtual.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The Tier 2 Public Safety/Firefighters Retirement Systems pension multiplier increased from 1.5% to 2%.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Members can log into their accounts and interact with us online via the message center. The message center isn't a live chat option, but they can send messages and receive responses online. We also conduct several live webinars each year. We do provide retirement planning and financial wellness counseling in-person and virtually. We do use Facebook.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

Rolled out a new Financial Wellness program last year that is an extension of our retirement planning program. This year we are trying to elevate the program by developing more webinars and brochures that cover various financial topics.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Would like to know if any other retirement systems are offering in-house financial/retirement planning advisors for their members. If so, how are they administering their programs. Would like to see if other retirement systems have implemented financial wellness programs. If so how are they administering their programs.



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# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
18,294	12,500	6,336	30	\$8.6 billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

Fairfax County Government continues to allow staff to telework up to 60% of their hours per pay period. This means that a minimum of four days every two weeks must be in the office. Most Retirement Systems staff have established specific days each week that they are in the office, but others will be in the office based on in-person appointments which could change from day-to-day. The receptionist staff of two is an exception, and they are both in the office every day. This means that they are available for paperwork drop-off and review and members aren't limited to when they can speak with someone. There are others who choose to work the majority of their time in the office and don't follow a set schedule for when they are teleworking. Training classes remain virtual with great success. Occasionally there is a comment where someone mentions the return of in-person classes, but the vast majority of comments are appreciative of the virtual format citing that it saves time and is more convenient.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

We offer 10 different classes that focus on retirement. They are targeted to where in the “retirement life cycle” a member is. All our classes remain virtual using Microsoft Teams. Our online videos (14) are accessible on demand, and we also have sections online for Q&A, FAQs, and Tip Sheets. The major change for training is that phone calls to our training department can be switched to a virtual training session using Teams. This is especially helpful for calls about the online benefit estimator tool because we can screen share and see exactly what the member is seeing.

- **New Employee Orientation (NEO)** – New employees are required to attend this class which provides an overview of all benefits including their defined benefit plan. The Retirement Systems is a guest speaker on a Zoom platform. A representative from the Retirement Systems participates in every NEO which is held every other week by Human Resources. The presentation is about a 20-30-minute “tip of the iceberg” description of the Defined Benefit Plan provisions for new hires.
- **Introduction to Fairfax County Retirement** – This is a follow-up to the NEO presentation, and it allows more time for details, examples, and questions. The class is offered every other week, opposite the week of NEO. The target audience for this class is specifically by invitation to the new hires in the previous week’s NEO, however, anyone is welcome to attend any session. *(60 minutes)*
- **The Road to Retirement (RtR)** – In addition to reviewing the defined benefit plan, this class provides general information about retirement and saving for retirement. All members of the Employees’ Retirement System, including our public schools members, are eligible to attend this class. We hold these classes every other month. *(90 minutes)*
- **Retiring with Security (RwS)** – A representative of the Retirement Systems office provides a System-specific overview of the defined benefit pension plan for civilian and public safety employees. This class also provides an overview of the deferred compensation plan which is presented by a representative from the investment company that administers the 457 plan. This class is offered every other month. *(2.5 hours)*
- **Planning for Retirement (PfR)** – This is our most comprehensive class. It provides information to help members understand how their defined benefit pension is calculated and how decisions made with regard to years of service can affect a member’s annual pension income. Information is provided to help employees understand the differences between Normal Retirement and DROP participation. These sessions also provide information about county benefits members may be able to keep when entering retirement (i.e. health, dental and life insurance) and how length of service can increase the member’s health benefit subsidy. This class is offered monthly for ERS members and quarterly for Public Safety employees. *(3.5 to 4.5 hours)*
- **How to Use the Online Benefit Estimator Tool** - This is a hands-on workshop that explains the details of a member’s retirement benefit estimate. The class allows a member to follow step-by-step to generate their own estimate in class or to watch as the instructor generates a sample estimate. The class is open all members of the Retirement Systems who are not currently participating in DROP. It is offered every other month *(60 minutes)*
- **DROP Exit Workshop** - This fast-paced workshop includes brief presentations by Retirement Systems staff, the county's deferred compensation representative, and members of the county's HR Benefits staff. There are important decisions to be made about a member’s DROP account balance, deferred compensation, and other county benefits after retirement. Attendees, who must be currently participating in DROP, receive highlights of the most important **details about exiting DROP** and transitioning into Retirement. Workshops are offered every other month. *(75 minutes)*
- **Understanding Your Retirement - Special Request (UyR-SR)** - This “on-demand” class provides a review of the defined benefit plan for individual county agencies who request it. *(usually 45-60 minutes)*
- **Understanding Your Retirement Benefit as You Prepare for Retirement** - This class provides a comprehensive 80-minute Defined Benefit Retirement Plan overview, followed by a 1-hour Benefits presentation, with time for questions after. This class is specifically for School Employee members of FCERS. It is offered about 3 times each year, coinciding with teacher workdays.

- **Social Security by Social Security** – THIS CLASS IS CURRENTLY ON HOLD - Annually we offer 2 classes presented by the **Social Security Administration** that are open to all active and retired employees in Fairfax County, VA (90 minutes plus Q&A)

Section 3: *Legislation* – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

We are not currently pursuing any plan changes to contributions or benefits. All merit employees participate in the Defined Benefit Plan & all employees have the option to participate in Deferred Compensation (457 Plan).

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Our Retiree Services representatives assist retirees in any way the retiree chooses: virtually, by phone, by in-person appointment, and by walk-in service.

Our Membership Services analysts are counseling individuals by phone, virtually and in some limited cases, in-person. We continue to expand in-person appointment opportunities.

Retirement Training is currently virtual, by video, recorded virtual sessions, and narrated PowerPoints.

Our Open Enrollment meetings this year will be handled online for active employees and retirees. The Schools branch of benefit services is offering 4 virtual sessions each for retirees and active FCPS employees. They will again be using a virtual platform called Brazen.

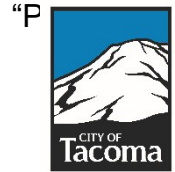
We offer an on-line member portal which allows members retirement view-only access except for generating their own retirement benefit estimates. We hope to expand the ability for members to do more online in the coming few years.

We do not currently have retirement on-line social media accounts, although we are working toward that.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

We strive to present current and timely information regarding the defined benefit plan and review our video library to maintain relevant information. Our video library consists of topics such as survivor benefits, how to complete forms, DROP, member's online account access and usage, and more. PowerPoint presentations are updated regularly when new information is available. Our forms continue to be accessible online and the relaxed requirements for submission have proven successful.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?



Benefits Contact		Title	Phone #	Email Address
Melanie Panui		Benefits Specialist	253-502-8590	mpanui@cityoftacoma.org
Communications Contact		Title	Phone #	Email Address
Member Education Contact		Title	Phone #	Email Address
Tim Allen		Director	253-502-8605	tallen@cityoftacoma.org
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
3149	2731	613	9	\$2.019 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

TERS has moved to hybrid work schedules (some days in the office, some days working from home) for all staff. Staff meetings remain online, and in-person meetings with members remain by appointment only (no walk-ins).

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

TERS offers retirement planning sessions covering the pension plan, Medicare and Social Security. During the pandemic these moved solely to online; we are now reverting to in-person sessions as well.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

N/A.

Section 4: Technology – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

Members have online access to our retirement calculator, and most counseling sessions have migrated to Teams/Zoom. TERS does not utilize social media.

Section 5: New Initiatives – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

N/A

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

N/A



Wyoming Retirement System



Benefits Contact		Title	Phone #	Email Address
Annette Camp		Benefits Supervisor	307-777-6107	annette.camp@wyo.gov
Communications Contact		Title	Phone #	Email Address
Kristin Kasper		Communications Manager	307-777-7776	Kristin.kasper@wyo.gov
Member Education Contact		Title	Phone #	Email Address
George Eason		Education program Manager	307-777-7266	George.eason@wyo.gov
# Active Members	# Retired Members	# Inactive Members	Staff Size	Assets (\$)
40,253	34240	9028	48	10.8 Billion

Section 1: Post Pandemic Impact – Please describe your return to office and, staffing, on premises vs. remote work, etc.

WRS never closed offices during pandemic. We did implement telework policies for departments that were not customer facing. Only closed office for two days due to sanitizing office after possible contamination. Now everyone is back in office, with some departments allow teleworking on a case by case situation.

Section 2: Member Education – Please describe the types of education/communications programs offered by your system. Do you have targeted communications for various age groups? **Have any of these models changed post pandemic?**

WRS was undermanned during the past year but now fully manned. We do in person presentation, informal group meetings and one on one meetings with members across the state. WRS educators continued to hold these meetings during the pandemic, both live and virtual. Biggest impact on education department was starting to hold more virtual meetings.

Section 3: Legislation – Briefly describe recently passed or currently pending legislation relating to plan changes and implementing multiple tier benefits in your system.

The legislature passed legislation to stabilize our Fire Plan A paid firefighter pension plan. The plan was closed in 1981 and due to cola's and some other factors was depleting the fund.

Section 4: *Technology* – Please describe how you interact with your members, both active and retired. Do you have an online member self-service program and if so, what do members have access to? Do you provide web counseling? Are you using Facebook, Twitter, chats, webinars, etc.?

We have continued to move our system to cloud based, which has enabled members and employees to quicker access their accounts and increase operating time for WRS staff.

Section 5: *New Initiatives* – Please describe any new projects/initiatives that your system is undertaking related to education, communications, and member benefits. Have you implemented any new ideas from previous NPEA conferences?

With a new Communication Manager on staff since September 15th, WRS is exploring our options to get more visibility on social platforms like Twitter, Tik-Tok and Snapchat. WRS is looking to talk with agencies that are currently using those platforms.

Section 6: Are there specific topics you are hoping to cover with your NPEA peers, or future topics you would like to see on the conference agenda?

Social media is the biggest topic we are exploring now to help our younger members get to know how their benefits work.