



LEOFF Plan 2 Board Meeting

July 22, 2009



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Department of Retirement Systems

Discussion Items

- ◆ DRS Background
- ◆ Moving from Customer Service to Satisfaction
- ◆ Member Enhancements
- ◆ Strategic Focus with Business Roadmap
- ◆ DRS and HCA Collaboration
- ◆ LEOFF Plan 2 Customer Contacts

DRS Background

◆ DRS

- Formed in 1976
- Brought all plan administration under one agency

◆ Structured into 4 business divisions

- Retirement Services
- Information Services
- Administrative Services (Financials & Employers)
- Policy & Strategic Initiatives

Retirement System Demographics

◆ Members

- 433,864 active and retired all plans
- 16,917 LEOFF Plan 2 active
- 1,347 LEOFF Plan 2 retired

◆ Employers

- 1,314

◆ Benefits Paid (May 2009)

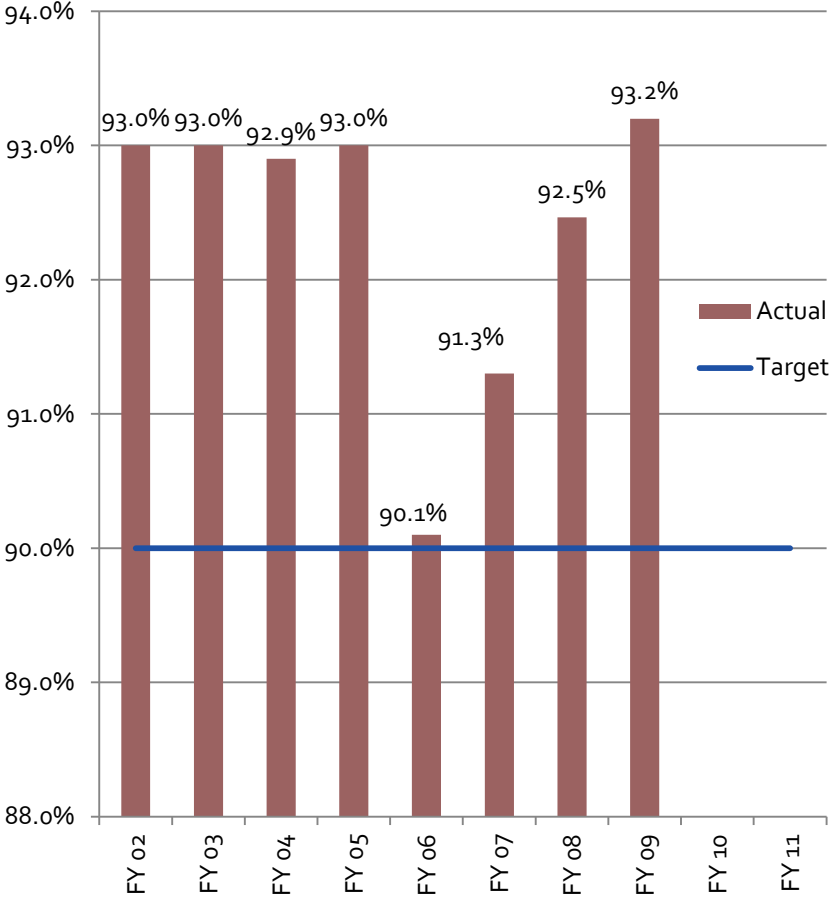
- \$217 million total
- \$3.8 million LEOFF Plan 2

◆ Contributions Collected (May 2009)

- Members \$86.9 million
- Employers \$108.8 million

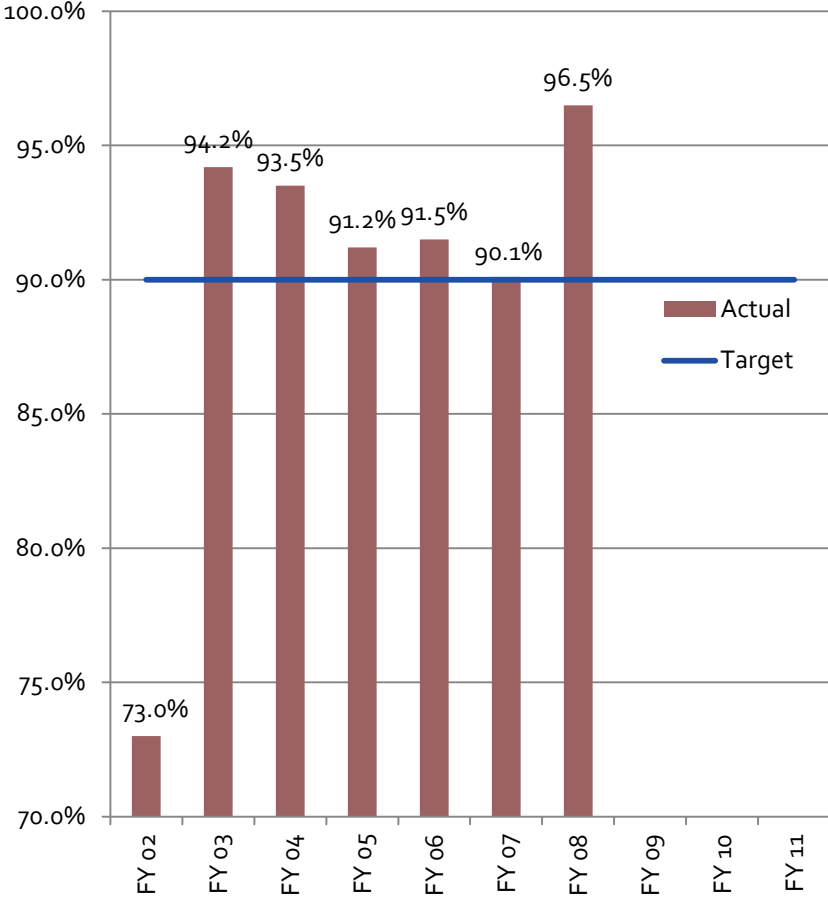
Service Measures

Incoming Phone Calls



(Answer >90% within 30 seconds)

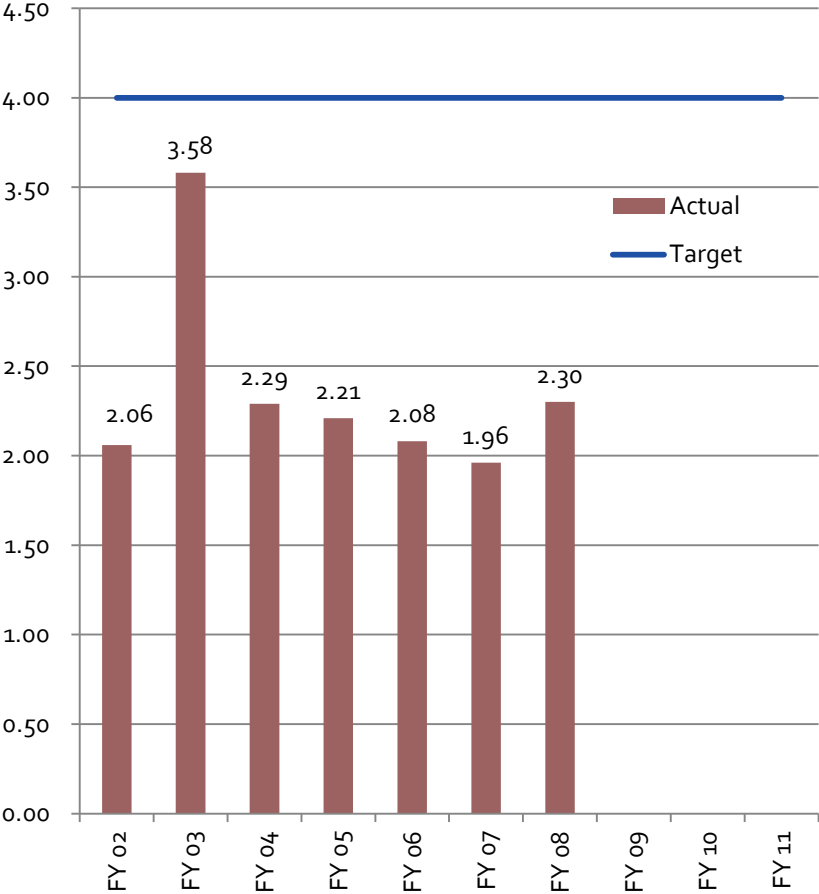
Member Correspondence



(Answer >90% within 5 days)

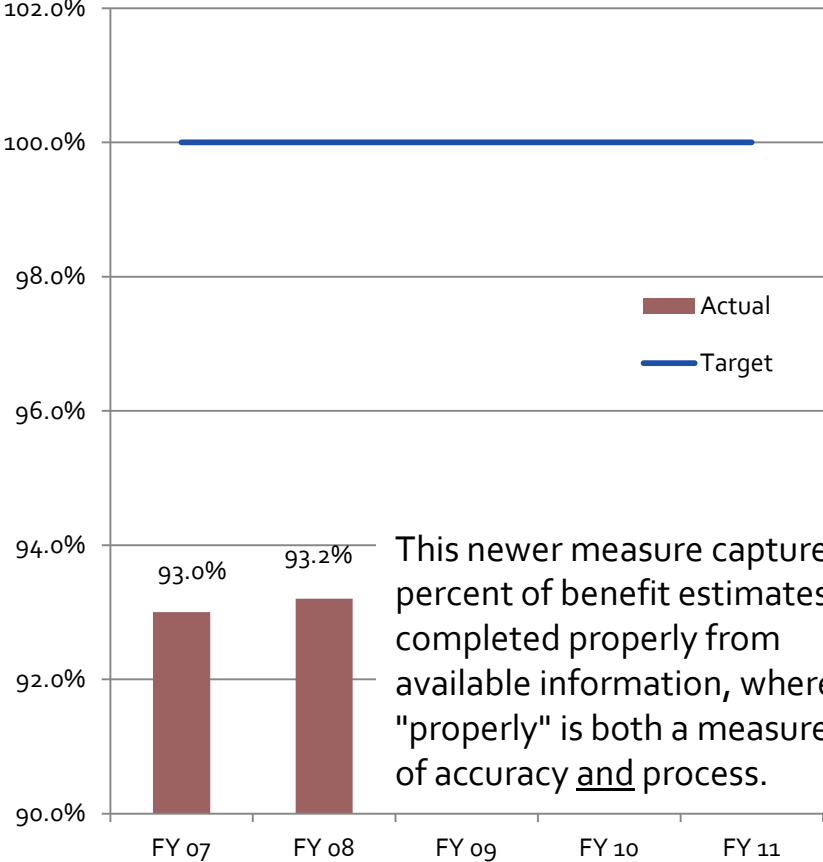
Service Measures

Walk-In Counseling



(RSA greet in <4 minutes)

Proper Estimate



(100% completed properly)

Customer Satisfaction

◆ From Customer Service to Customer Satisfaction

- Service measures in place and performing well
- What would it take to be 100% satisfied as a DRS customer
- In-person interviews
- Satisfaction criteria and ongoing measurements
- Continue to improve processes that aren't meeting needs and recognize the team from the customer perspective
- Leadership development runs parallel
 - role of leaders in high performing teams

Enhancements for members underway

◆ Multiple Member Enhancements in Progress

- Web site redesign – launching in August
 - future releases include knowledge base solution and other improved decision-making tools
 - on demand education
 - web counseling
- Promoting the online channel for self-service
 - single sign-on
 - annual statements
 - retirement application – running concurrently with improvements to the more traditional retirement process
 - member education
 - updating beneficiary and address information
 - opt-in/out print channel

Business Roadmap Initiative

- ◆ **Defining Products and Services for the Future**
 - Short, mid and long-term vision
- ◆ **Customer Needs will Drive Business Priorities**
 - Business roadmap
 - Technology roadmap
 - Organizational structure alignment
 - People development

◆ Efficiency Initiatives

- Shared demographic information
 - retiree address updates
- Joint counseling for members
 - DRS & HCA materials in interview rooms
 - speed dial in interview rooms
- Coordinating/streamlining the death notification process
 - joint system access for researching information
 - single point of contact for beneficiary to report information
 - changes will continue beyond the 90-day implementation

◆ Best Practices

- Fiscal note process
- IT processes
- Project management

◆ Evaluating Shared Services

- Communication teams
 - print to media
 - shared publications and newsletters
- Web services
 - shared portal and account access
 - knowledge bases

LEOFF Plan 2 Member Contacts

◆ Most common questions in last 90-days

- IRS changes in withholding tables
 - assisted retirees with new W-4P forms
- New legislation
 - service credit transfer for Fish and Wildlife Enforcement Officers
 - no cost interruptive military service
- Retirement planning
 - questions about impact of reduced work hours or furloughs
- COLAs
 - questions about expected dollar amount

LEOFF Plan 2 Members Online

◆ Defined Benefit Online Access (July 14, 2009)

Registered since implementation	
Active	7334
Inactive	616
Retired	268

Logged In 7/2008 - 6/2009												
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Active	843	833	855	895	865	874	1120	1023	1666	1038	976	948
Inactive	54	52	74	64	47	41	67	47	106	64	47	53
Retired	41	28	47	32	32	38	52	42	45	64	41	42

Screens Viewed 7/2008 - 6/2009	
Welcome	3383
Plan Summary	3121
Service Credit Detail	2100
Employment History	2037
Benefit Estimator	2884
Purchase Service	1649

Summary

- ◆ **100% customer satisfaction driven organization**
 - Leadership Development
 - High performing teams
- ◆ **Promote and encourage the online channel while also improving more traditional channels**
 - Effective project management
 - Strong information technology infrastructure
- ◆ **Collaborate with HCA and other agencies to provide seamless service**
- ◆ **Understand the unique needs of our membership across the plans**



Questions/Comments