Lean Estimate Team

Employer Advisory Committee – February 16, 2012
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Lean Estimate Team Overview

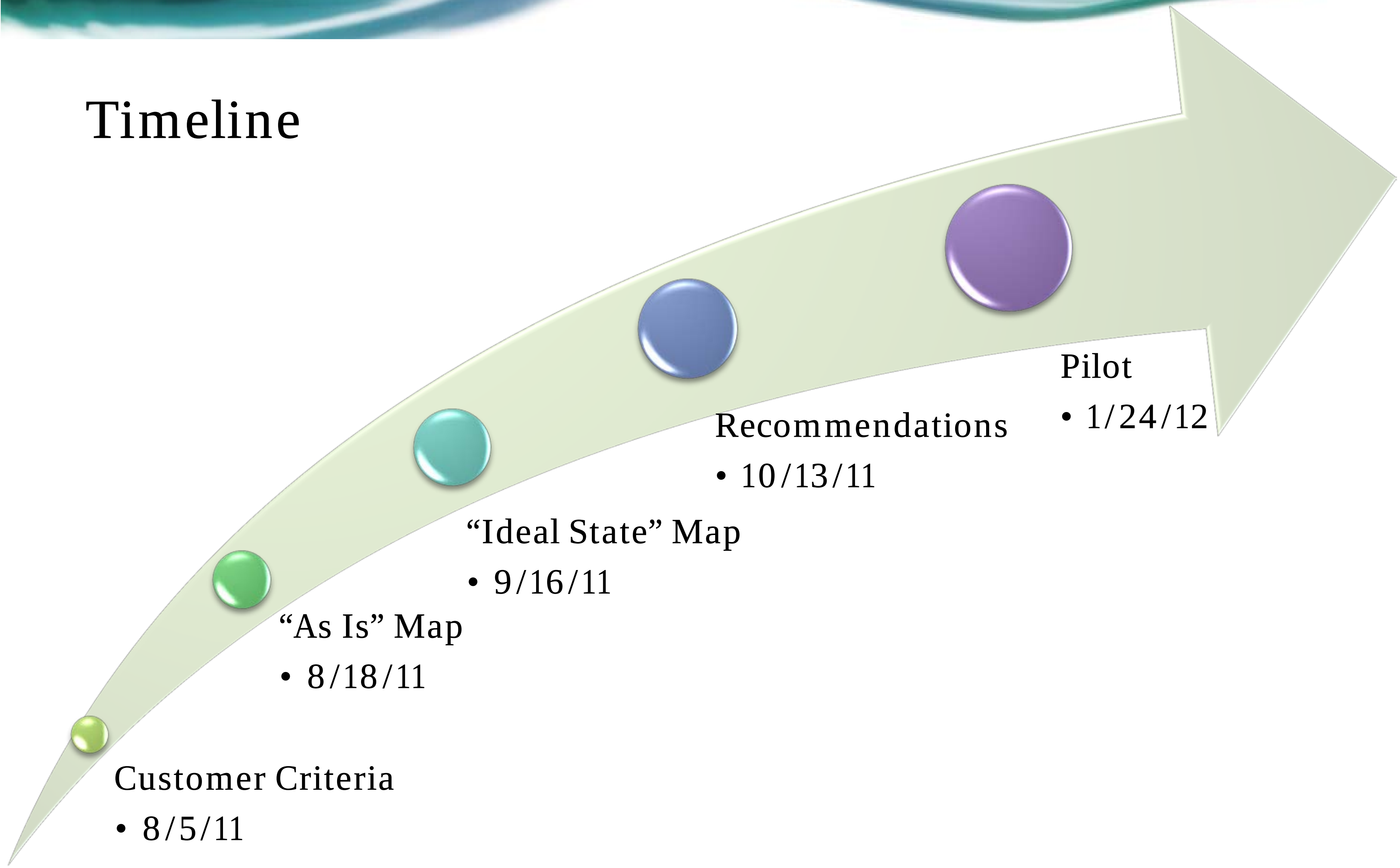
Team reviewed the benefit estimate process

- Goals:
  - Increase customer value and reduce waste
  - Standardize the benefit estimate process
- Scope:
  - Benefit estimates are a core process
  - First step in retirement process
  - Impacts all retirement systems and plans
  - All RSAs produce benefit estimates

Team Composition

- DRS Lean Practitioners
- Retirement Service Analyst (RSA) representatives from PERS/SERS, TRS and LEOFF
- Employer Support Services (ESS) representative
- Information Services representative
- RSA Trainer

Timeline



Customer Criteria
• 8/5/11
"As Is" Map
• 8/18/11
"Ideal State" Map
• 9/16/11
Recommendations
• 10/13/11
Pilot
• 1/24/12

Estimate Team Recommendations

1) Comprehensive checklist of questions or prompts
2) Centralized member “data clean-up” team
3) Ballpark estimates
4) “First in – First out” distribution of estimates
5) Personalized retirement portfolio

Current Status

- Centralized “data clean-up” team
    - 4-6 month pilot in PERS / SERS
    - Team of 4 RSAs
    - Streamline and improve interaction with employers

- Comprehensive checklist of questions or prompts
    - Small team developing checklist
    - Next recommendation to pilot

- “First in –First out” distribution of estimates
    - Included as part of RSD Workflow Restructure Project (now underway)

Streamline and improve interaction with employers

- Create “Cheat Sheet” for RSAs
  - Commonly asked questions (i.e. July 2007 HCA payment that caused spike)
  - Review before sending out Member Reporting Verification (MRV)

- Create small team of RSAs who work with employers
  - Coordinate with Employer Support Services (ESS)
  - Build relationships with employers

- Coordinate with employers on best method/frequency for requests
  - MRV
  - Verification of Employment (VOE)
  - Furlough

Questions?