

RETIREMENT WORKSHOPS REDESIGNED -online registration now available-

PERSI members with Internet access and email can now go online to register for retirement workshops. Online registration is one of many recent changes to the PERSI educational program.

Program Redesigned

For the past 6 years, PERSI has offered educational workshops to members nearing retirement. During the last year, however, the program has undergone a major redesign. Starting with two new trainers, the program has been completely overhauled to meet the needs of baby boomers who are approaching retirement age.

Retirement's a Beach



The "Retirement's a Beach" (RAB) workshop targets members within 5-10 years of retiring. This 4-hour workshop is held at off-site locations throughout the state

and conducted throughout the year. When reassessing the original program, PERSI realized it could just as effectively present the same retirement information in 4 hours as it had done in 8-hour sessions in the past. Two changes would make this possible: (1) having a Retirement Specialist available at each workshop to answer specific questions from members; and (2) taking a higher level look at the issues rather than covering the small details. These two modifications not only freed up time, but also allowed additional topics to be covered. Besides the PERSI Base and Choice Plan benefits, the workshop covers Social Security, Medicare and other health care options, wills, trusts, estate planning, tax implications of retirement income, and powers of attorney. Attendees receive a comprehensive workbook and a retirement estimate at the workshops. Spouses are welcome to attend the workshop, but must be registered.

Rave Reviews...and a Shorter Waiting List

The new program has been very well received. By reducing the workshops from 8 to 4 hours, PERSI is able to conduct two workshops a day. With 30 people in each workshop, twice as many members are served in the same amount of time. This has reduced the waiting list to nearly zero for the first time in 6 years.

How to Register On Line

Online registration is simple. You start by logging onto the PERSI Web site at www.persi.idaho.gov. Under the "Education" tab on the Home Page, click on "Online Registration" on the drop-down menu. Scroll down to the schedule for the Retirement's a Beach workshops. The schedule provides the date, city, time, and availability for each workshop. After finding an available workshop that's convenient, click on "Enroll Online Now," which will open the "Account Log On" page. **(Members must be registered to view their account before they can utilize the online registration option.)** After logging on, simply complete the form and click the "Register" button. If everything was completed properly, a personalized "Thank You" screen will appear confirming registration and the date and time of the workshop selected. PERSI will automatically send the member a confirmation email within a few minutes. **PLEASE NOTE:** The box acknowledging the member read and understood the cancellation fee policy must be checked before registration can be finalized.

PERSI will contact each registrant prior to the workshop to confirm attendance. At that time, specific location information will be provided. Questions about the workshops or online registration should be directed to PERSI via email at workshops@persi.idaho.gov. Members who don't have Internet access or email can call PERSI at (208) 334-3365 from the Boise area or toll-free at 1(800) 451-8228 from elsewhere in Idaho to register for a workshop.

GOVERNOR HOLDS CABINET MEETING AT PERSI

Governor Otter recently began holding his Cabinet meetings in the office of a different department head each month. PERSI hosted the May meeting.

The PERSI management team made a presentation that included a general overview of the agency, membership numbers, investment results, and operational information. Each PERSI operating unit provided details about their area, including in-coming phone call data, customer service survey results, IT upgrades and updates, workflow and imaging statistics, employer training and certification program success, and a PERSI Web site visit. The Cabinet toured PERSI following the meeting.



Governor Otter (l) and PERSI Executive Director Alan Winkle (r) listen intently to a Cabinet meeting discussion.

REMINDER: Sick leave contribution rates will not change in 2007. The rate changes slated for July 1, 2007, have been postponed for a year.

IDAHO BUSINESS REVIEW RECOGNIZES TWO PERSI WOMEN



PERSI Answer Center Supervisor Kimberlee Hall (l) and IT Systems Analyst Stacy Jones (r) were recognized by the Idaho Business Review at the Accomplished Under 40 Awards luncheon on June 22nd. Winners were selected based on personal and professional achievements and community service.



Notes

Executive Director [Alan Winkle](#) attended the annual National Council on Teacher Retirement (NCTR) Conference held in Keystone, CO. The conference discussions centered on best practices for call centers, how world politics impact pension systems, technology improvements, and legislative updates.

In May, Deputy Director [Don Drum](#) participated in the NCTR Deputy Director's Conference in Boston, where disaster recovery plans, technology improvements, and hedge funds were discussed. He also participated in the CEM Benchmarking, Inc. Conference that focused on performance measures for pension systems.

PERSI Answer Center Supervisor [Kimberlee Hall](#) attended the International Customer Management Institute Call Center Demo and Conference in Dallas where she listened to several lectures on effective call center management and learned about tools for managing people and calls.

Chief Investment Officer [Bob Maynard](#) reported that as of June 20, 2007, the fiscal year to date return on PERSI investments was 20.2% and the current value of the fund was \$11,496,546,264.