

## CHANGES IN THE EMPLOYER SERVICE CENTER - new leadership, new faces, new direction -

The Employer Service Center (ESC) has recently undergone some personnel changes, so it's a good time to introduce the new people and acquaint you with those who've been around for a while. This is also a good time to talk about the future of ESC.

### Management Change

Diane Kaiser is the new ESC manager. You may remember her from past employer meetings. Before moving to ESC, Diane spent 3 years managing PERSI's defined contribution plan — better known as the Choice Plan 401(k). The manager's position opened up when Debbie Buck accepted another position within PERSI. Intrigued by ESC, Diane thought taking a leadership position in the department would provide her with an opportunity to learn more about "the guts" of PERSI and to become more involved with employers while expanding her knowledge of PERSI in general.

Diane is well-qualified for the job. She has a bachelor's degree in Business Administration with an emphasis on human resources from BSU, a micro-MBA in business from BSU, and is currently enrolled in the state's Certified Public Managers (CPM) program.

Changes in management for any organization or department inevitably means other changes will also occur. It's no different for ESC. Diane expects to continue expanding the role of ESC staff at the annual employer meetings. She plans to build on the existing model established by Debbie to make sure the meetings improve each year, and that they continue to provide useful information to meet the growing needs of employers.

While PERSI assesses its needs, Diane will continue to oversee the Choice Plan. Since ACS manages many of the daily operations associated with the 401(k) program, PERSI members will receive the same high-quality service as always.

### The ESC Team

Six fiscal technicians comprise ESC, all with a wealth of financial knowledge and all available to assist employers with their transmittals and questions. If you attended one of this year's employer meetings, you may already be familiar with most of these fine folks since they gave presentations at the meetings. If not, this is your opportunity to learn more about the group who provides service to you.

[Alan Roberts](#) has been with PERSI nearly 6 years, coming from an accounting firm in Utah where he spent 2 years. He holds a bachelor's degree in accounting from the University of Montana and is a Certified Public Accountant (CPA). Besides processing transmittals, each month Alan assists with various Choice Plan reports.

- **Biggest challenge for employers:** The turnover rate for payroll personnel and making sure new staff are properly trained.
- **Most asked question:** How do I do this?

[Alice Brown](#) joined PERSI 7 years ago, bringing 17 years' experience in the banking industry to her role as a fiscal technician. She came to Idaho from California where she attended Bakersfield Community College.

- **Biggest challenge for employers:** Transitioning to a paperless work environment.
- **Most asked question:** Can you explain eligibility?

[Barbara Weirick](#) can't recall a time when she didn't work for PERSI...after almost 30 years, that's no surprise. During her time at BSU, Barbara studied accounting and elementary education. She plays an integral role in testing PERSI's database, running various reports for the Firefighters' Retirement System, and processing transmittals.

- **Biggest challenge for employers:** Electronic reporting.
- **Most asked question:** Can you explain eligibility? How do I do this?

[Linda Whitney](#) is a newcomer to PERSI. She came on board about 5 months ago. Before joining PERSI, she worked in the finance department for a large automotive dealership, and spent 30 years in the financial industry. Despite being new to PERSI, Linda was called upon to make a presentation at in the 2007 employer meetings... and she did a great job!

- **Biggest challenge for employers:** Too soon to say.
- **Most asked question:** Can you explain terminations?

[Pam Fowers](#) started with PERSI in 2003, but has been in public service for the last 24 years, working at Health and Welfare, the Liquor Dispensary, and for the INEEL Oversight Program. She attended Idaho State University. Along with transmittals, Pam cancels warrants for deceased retirees and does the federal tax withholdings on retiree payroll and separations.

- **Biggest challenge for employers:** Transmittal data quality.
- **Most asked question:** No one question stands out.

[Steve Jones](#) just passed the 4-month mark at PERSI. Prior to coming to PERSI, he spent 12 years as the Controller for a trucking company. Steve's educational background covers accounting, finance, human resources, and computer operations. In addition to learning about PERSI and ESC operations, Steve handles daily reconciliations, deposit reports, and processes transmittals.

- **Biggest challenge for employers:** Converting to computerized processing, such as PETRA.
- **Most asked question:** Why was my transmittal rejected?

### Debbie's Success

Debbie Buck managed ESC for nearly 6 years, going back to when it was called the Technical Support Unit. When Debbie joined PERSI in 1993, she made a promise to herself to complete her education, expand her business, management, and accounting skills, and one day become a senior account at PERSI. Earlier this year, the senior accountant position became available and Debbie went for it. She was awarded the job based on her knowledge of PERSI and because she had prepared herself by completing her bachelor's degree and becoming a Certified Government Financial Manager – the government's equivalent to a CPA. She is currently enrolled in the state's 36-month CPM program, which she will complete in December. With this kind of drive and determination, it's been no surprise that Debbie successfully led ESC for so long and established the business model for the department to follow going forward.

### Ambitious Plans for the Future

With new leadership, new faces, and new roles and responsibilities, ESC is positioned to continue serving employers well into the future. In the upcoming months, Diane will focus on training opportunities for employers, introduce a new audit program, and design a cross-training program for the ESC staff... ambitious plans with a huge payoff for PERSI and employers.

To contact ESC, employers can call (208) 287-9525 from the Treasure Valley, or phone toll-free 1-866-887-9525 from other parts of the state.

### Notes

[Jody Olson](#) was reappointed by the Governor to serve another 5-year term on the PERSI Retirement Board. His current term will expire in 2012.

Chief Investment Officer [Bob Maynard](#) reported that as of August 26, 2007, the fiscal year-to-date return on PERSI investments was -1.3% and the current value of the fund was \$11,330,870,041. The downturn is attributed to recent market volatility.

Executive Director [Alan Winkle](#) and Deputy Director [Don Drum](#) attended the National Association of State Retirement Administrators (NASRA) annual conference held in Florida. The agenda covered investment management, world events applicable to the pension industry, actuarial issues, data processing, health care, and significant happenings in each of the states and territories.

National 401(k) Day is September 7, 2007. This annual celebration spotlights the importance of employer-sponsored retirement savings. **Make Every Day 401(k) Day** is this year's theme. You can learn more at [www.pasca.org/401k.html](http://www.pasca.org/401k.html) the Web site of the Profit Sharing/401k Council of America.