



## Ohio Retirement Study Council

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To: Members of the Ohio Retirement Study Council  
From: Jeffery A. Bernard, Senior Research Associate, ORSC  
Date: November 6, 2014  
Subject: Format of system reports

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Bethany Rhodes

At its November 2014 meeting, the Ohio Retirement Study Council asked its staff to compile a list of reports needing alternate or standardized formatting. Considering comments from the Council, the objective of a report reformation project would be to increase uniformity, provide additional information requested by Council, and remove superfluous or uninformative information. As always, a concise yet complete report is the primary objective.

The following is a list of annual reports received by the Council that staff believes merit review. We have limited the list to those reports that are created annually by the systems (i.e., we are not recommending a formatting review of outside vendor reports).

### **Annual reports needing a review of format**

- 1) Annual Disability Report
- 2) Iran/Sudan Divestment Report
- 3) Annual Health Care Report
- 4) Annual Budget Report
- 5) Annual Internal Audit Activities Report
- 6) Ohio Managers Report

### **Approval of procedure at next Council meeting**

ORSC staff is seeking approval of an action plan to review the preceding list of reports. Does the Council wish to add or delete reports to the preceding list? What should be the order of review? After informed of the list and order of reports to be reviewed, staff will create a timeline for a reformatting project. Barring other staff obligations, we would anticipate each review to be completed over a two to three-month period. Therefore,

if all six reports are to be reviewed, we would anticipate the project being completed over the course of a year or year and a half.

Staff propose the following process for each review:

- 1) A brief presentation at a regularly scheduled ORSC meeting of a specified report;
- 2) Discussions with ORSC at the regularly scheduled meeting or, as necessary, additional discussion regarding what the Council expects from the specified report;
- 3) ORSC staff will coordinate with system staff to create a new report form based on the Council's instructions;
- 4) A draft of the new report form will be provided to the Council.
- 5) Changes will be made as necessary until the Council approves the report format.
- 6) Repeat 1-5 for each report.

If you have any questions, please contact Jeff Bernard at 228-5644 or Ashley Wilson at 228-3612.