



SCHOOL EMPLOYEES RETIREMENT SYSTEM OF OHIO

300 E. BROAD ST., SUITE 100 • COLUMBUS, OHIO 43215-3746
614-222-5853 • Toll-Free 800-878-5853 • www.ohsers.org

RICHARD STENSRUD
Executive Director

HELEN M. NINOS
Deputy Executive Director

April 26, 2018

Bethany Rhodes, Director/General Counsel
Ohio Retirement Study Council
30 East Broad Street, 2nd Floor
Columbus, OH 43215

Re: Communications Report

Dear Ms. Rhodes:

Pursuant to R.C. 3309.041(E), enclosed please find an updated plan describing how SERS will improve the dissemination of public information pertaining to the Board.

As always, please feel free to contact me if you have any questions.

Sincerely,

Richard Stensrud
Executive Director

Enclosure

RETIREMENT BOARD

DANIEL L. WILSON
Chair, Appointed Member

JAMES A. ROSSLER, JR.
Vice-Chair, Appointed Member

JEFFREY DELEONE
Appointed Member

HUGH GARSIDE, JR.
Employee-Member

JAMES H. HALLER
Employee-Member

CHRISTINE D. HOLLAND
Employee-Member

CATHERINE D. MOSS
Retiree-Member

BARBRA M. PHILLIPS
Employee-Member

BEVERLY A. WOOLRIDGE
Retiree-Member



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Communications Report

SERS is dedicated to delivering timely and relevant information to the following target audiences: active and retired members, employers, staff, media, the Ohio legislature, the Ohio Retirement Study Council (ORSC), advocacy groups, inactive members, tenants of SERS' building, and all Ohio residents including potential job seekers and vendors. To connect with the system's diverse membership and target audiences, SERS uses traditional printed materials, electronic materials available for download from our website, a full-service call center, group presentations throughout Ohio, and social media.

The following information outlines the vehicles used by SERS to provide quality communication to all of its key audiences.

ACTIVE MEMBERS:

1. ***Future Matters*** – Mailed to all active members. Two versions of the newsletter are prepared three times per year, one with content tailored to people who are under age 45 and the other for people over age 45. Content includes relevant system news, Board actions, benefits, upcoming events, and legislative activity.
2. ***Traveling Your Path: Member Benefits Guide*** – Describes benefits available to members through SERS.
3. ***Member Educational Web Series*** – A video series posted to our website that is designed to educate members about service credit, eligibility, Social Security Offset/Windfall, deciding when to retire, completing a service retirement application, and refunds.
4. ***Annual Statement*** – Mailed every September to all active and reemployed members, this statement includes the member's history of contributions, amount of service credit, and projected benefits at the earliest available retirement date.
5. ***SERS Update*** – A one-page handout that accompanies the annual member statements to explain how to read the statement, investment and actuarial information, schedule of educational opportunities, legislative updates, and the latest SERS news.
6. ***Member Support Team*** – Highly trained customer support representatives answer member questions about SERS' pension and health care benefits on calls received through our toll-free numbers.
7. ***Counseling*** – Members who want an individual conference with a SERS counselor are welcome to visit the downtown Columbus office. SERS also offers remote counseling in which counselors travel to different parts of the state to meet with members where they live.
8. ***Online Account Access*** – Members can view their service credit and account balance through the Member Account Login on SERS' website. They also can update personal information such as address, banking information, and beneficiary selection.
9. ***Educational Workshops and Seminars*** – SERS' staff travels around the state to provide information about benefit options, pre-retirement counseling, pension estimates, health care access, and outreach services.



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RETIREES AND DISABILITY RECIPIENTS:

1. **Focus and Partners in Health and Wellness newsletters** – Mailed to all retirees, these publications include relevant news, health care information, updates on Board actions, upcoming events, and legislative activity. They accompany check stubs that are mailed to retirees quarterly.
2. **Online Account Access** – Retirees can view their check stubs and 1099-R forms through the Member Account Login on SERS' website. They can also update personal information such as address and banking information, and view account balances if they are reemployed.
3. **Open Enrollment Guide** – Information about SERS' health care coverage plans for the coming year.
4. **Open Enrollment Meetings and Webinars** – SERS' staff travels throughout Ohio to provide information regarding open enrollment changes. Staff also provide open enrollment webinars for those who are unable to attend an in-person meeting.

EMPLOYERS:

1. **Employer Bulletin** – An e-newsletter that is emailed to all employers four times per year. The publication contains updates on Board actions, upcoming events, legislative activity, and relevant employer news.
2. **Employer Special Notice** – An e-newsletter that is emailed to all employers to address an urgent or timely issue regarding contributions, eSERS updates, penalties, or new member enrollment.
3. **eSERS Employer Online Account Access** – Employers can view their financial and employee information through the Member Account Login on SERS' website. They also can submit contributions and update employee information.
4. **Employer Education Web Series** – SERS' website features an Employer Video Center page that contains numerous training videos on the features of the eSERS reporting software.
5. **Employer Outreach Training Visits** – SERS' staff will visit any employer that is interested in hands-on training.
6. **eSERS Hands-On Training** – SERS' staff holds half-day training sessions at its Columbus headquarters for employers that would like a hands-on refresher focused on member registration and contribution payments through eSERS.

ORSC AND OHIO LEGISLATURE:

1. **Regular Attendance at ORSC Meetings** – SERS' executive director and relevant subject matter experts regularly attend monthly ORSC meetings.
2. **Interaction with ORSC Staff** – SERS' staff regularly interacts with ORSC staff to provide information and produce statutorily required reports.
3. **Individual Meetings With Legislators** – SERS visits with legislators on key committees, schedules introductory meetings with new legislators, and works with legislative staff on various bills and constituent issues. Staff also meets with other state officeholders.



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4. **Economic Impact Handouts** – SERS' staff annually prepares handouts that explain SERS' economic impact to the state and individual legislative districts.
5. **SERS Annual Health Care Report** – This publication provides information on health care statutes, administrative rules, history, summary of coverage, cost and funding, and policy.

MEMBER AND RETIREE ADVOCACY GROUPS:

1. **Presentations and Attendance at Advocacy Group Meetings** – SERS proactively reaches out to groups that advocate on behalf of members and retirees. These presentations may include benefit discussions and updates on current developments.
2. **Pension and Health Care Roundtable** – SERS invites representatives from member and retiree advocacy groups to an annual roundtable meeting that covers relevant system news and financial updates.
3. **Notification of Board Meetings** – The Board agenda and meeting schedule notices are distributed via the SERS website and email.

OTHER TARGET AUDIENCES:

1. **www.ohsers.org** – The SERS website is the primary resource for system information. Print materials available to target audiences are also available in electronic format through the website.
2. **Facebook and Twitter** – SERS' communications staff uses these social media platforms to engage with target audiences by posting timely information about topics relevant to our membership and retirement security.
3. **Board Meeting Highlights** – Following each Board meeting, staff prepares an overview of the topics discussed during the meeting and details of the decisions made. The *Highlights* document is posted to the website and sent electronically to those who have added their email address to our distribution list.
4. **Comprehensive Annual Financial Report (CAFR)** – Prepared as an annual report each year to aid interested parties in assessing the status of SERS, the CAFR includes a report from an independent auditor, a discussion by SERS management, financial statements of the system, actuarial statistics, and historical data. The investment section contains an investment report, portfolio summary, and SERS' investment policy and guidelines.
5. **Summary Annual Financial Report (SAFR)** – The SAFR is an eight-page summary of the CAFR, which includes a brief overview of the financial health, investment performance, demographics, and key accomplishments of the fiscal year.