



ARIZONA STATE RETIREMENT SYSTEM

3300 NORTH CENTRAL AVENUE • PO BOX 33910 • PHOENIX, AZ 85067-3910 • PHONE (602) 240-2000
4400 EAST BROADWAY BOULEVARD • SUITE 200 • TUCSON, AZ 85711-3554 • PHONE (520) 239-3100
TOLL FREE OUTSIDE METRO PHOENIX AND TUCSON 1 (800) 621-3778
WWW.AZASRS.GOV

Paul Matson
Director

MINUTES OF THE PUBLIC MEETING OF THE ARIZONA STATE RETIREMENT SYSTEM OPERATIONS EDUCATIONAL SEMINAR

**HELD ON
Tuesday, April 23, 2019
2:00 p.m.**

Trustees of the Arizona State Retirement System (ASRS) Board met with members of the ASRS staff at 3300 N. Central Avenue, 14th Floor, Phoenix, AZ 85012 who hosted an Educational Seminar related to the operations of the Agency. Though there was a quorum present of the ASRS Operations, Audit, and Legislative Committee (OALC) and Investment Committee (IC), no Committee business was discussed.

The seminar commenced at 2:00 p.m.

Trustees present: Mr. Tom Manos, Mr. Jim Hillyard, Mr. Michael Lofton, and Mr. Michael Miller.

1. Presentation and Discussion Regarding a Comprehensive Guide on the Design and Delivery of ASRS Plans and Services

Mr. Anthony Guarino, Deputy Director and Chief Operations Officer, had members of the staff introduce themselves to the Board, and described the presentation as a birds-eye, lifecycle view of members' and employers' experiences as they navigate through our three main areas of business: pension administration, long-term disability administration, and health care administration.

The presenters were as follows: Ms. Jenna Golab, Member Advocate; Mr. Brian Crockett, Sr. Strategic Planning Analyst; Ms. Jenalee Hopkins, Sr. Strategic Planning Analyst; Ms. Julie Lockwood, Program Manager, Member Services Division; Ms. Randi Gray, Member Education Supervisor; and Ms. Sara Orozco, Manager, Strategic Planning and Analysis. The topics discussed were as follows:

- a. Member Eligibility and Enrollment
- b. Member Contributions
- c. Service Purchase
- d. Transferring into, or Out of the ASRS
- e. Leaving employment; Becoming Inactive
- f. Leaving employment; Withdrawal of ASRS Contributions
- g. Leaving Employment; Disability
- h. Death of an Inactive or Active Member
- i. Retirement
- j. Post-Retirement Events
- k. Retiree Health Insurance; Health Benefit Supplement
- l. Death after Retirement
- m. Customer Service: Calls, Secure Messages, Appointments

- n. Member Education Services
- o. Employer Education Services
- p. Secure Member and Employer Website
- q. Other Communication Methods

Trustee and staff discussion occurred throughout the presentation while staff responded to various questions from the Trustees.

On behalf of the Board, Mr. Tom Manos thanked the staff for pulling this presentation together. It was well done and appreciated and the reference sheet contained just the right amount of information.

2. Adjournment

The seminar adjourned at 4:20 p.m.

Respectfully Submitted by:

Joyce Williams
Board Administrator
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