



ARIZONA STATE RETIREMENT SYSTEM

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Paul Matson
Director

SUMMARY OF DISCUSSION BY NON-QUORUM ARIZONA STATE RETIREMENT SYSTEM (ASRS) BOARD MEMBERS AND ASRS STAFF OPERATIONS EDUCATIONAL SEMINAR

**HELD ON
Thursday, May 2, 2019
2:00 p.m.**

A non-quorum of the 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.

The seminar commenced at 2:05 p.m.

Trustees present: Mr. Clark Partridge and Mr. Rene Guillen.

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, opened the presentation and described the presentation as a wide-angled, 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. Mr. Guarino introduced the presenters and turned the seminar over to them.

The presenters were: 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 Mr. Nate Brengle, Creative Services Manager. 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.

The Trustees thanked the staff for pulling this presentation together. It was well done and appreciated.

2. Adjournment

The seminar adjourned at 4:27 p.m.

Respectfully Submitted by:

Melanie Alexander
Board Administrator
ARIZONA STATE RETIREMENT SYSTEM