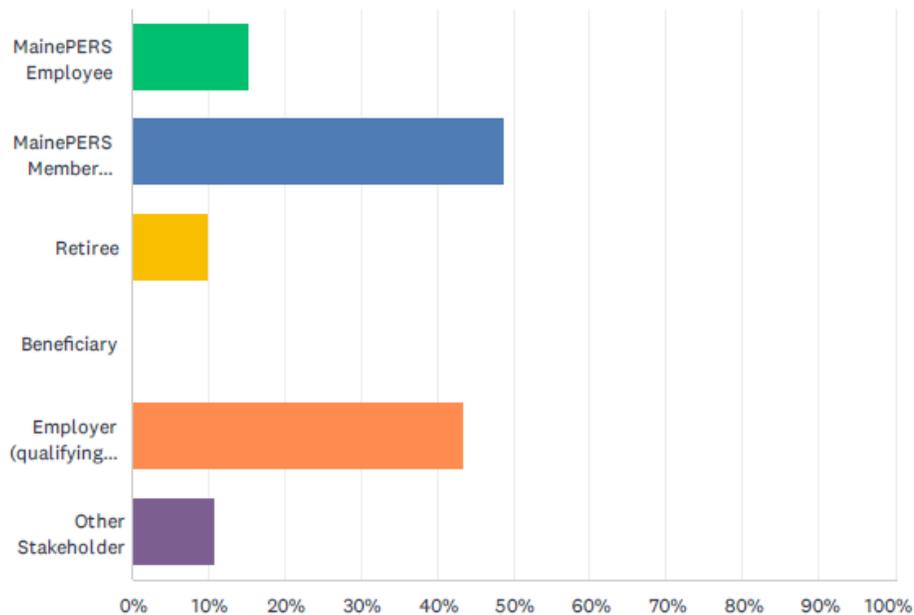


**Survey Results: DRAFT 5-Year Strategic Plan  
June 13 to June 24, 2022**

This document provides the summary graphics of data from the fixed answer survey questions along with respondent comments displayed in the order received. The numbering sequence follows the respondent’s comments for each question. The appendix includes written comments that were submitted through email.

**Q1 What is your relationship to MainePERS? Please select all that apply.**

Answered: 113 Skipped: 0



ANSWER CHOICES	RESPONSES	
MainePERS Employee	15.04%	17
MainePERS Member (employee actively working for a qualifying employer)	48.67%	55
Retiree	9.73%	11
Beneficiary	0.00%	0
Employer (qualifying MainePERS employer)	43.36%	49
Other Stakeholder	10.62%	12
<b>Total Respondents: 113</b>		

**1. What is your relationship to MainePERS? Please select all that apply and Stakeholder identification**

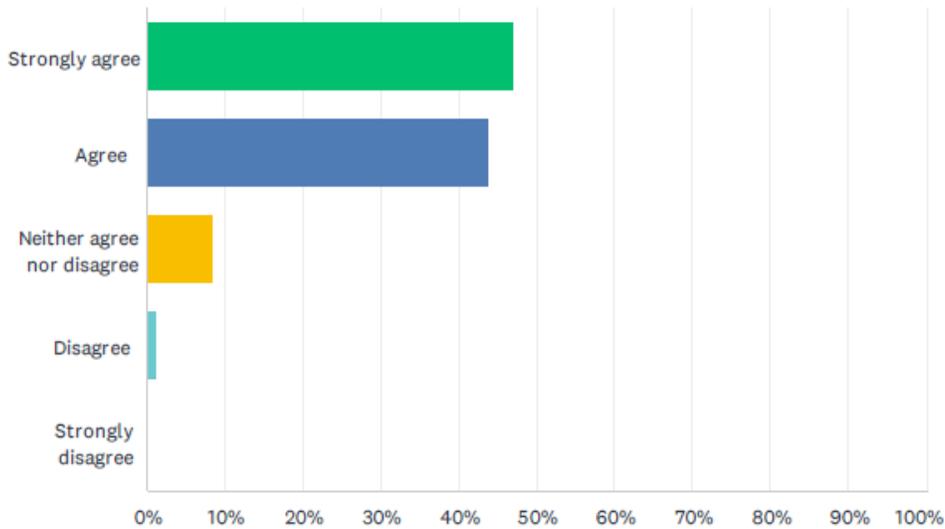
Response #	Q1. What is your relationship to MainePERS? Please select all that apply.	If Other Stakeholder, please specify
1	MainePERS Employee	
2	Other Stakeholder	HR Coordinator for employer
3	MainePERS Member; Employer	
4	Employer	
5	MainePERS Member	
6	Employer	
7	MainePERS Member; Employer	
8	MainePERS Member; Employer	
9	Retiree	
10	Retiree; Employer	
11	MainePERS Member; Employer	
12	MainePERS Employee; MainePERS Member	
13	MainePERS Member; Employer	
14	Employer	
15	Retiree	
16	Other Stakeholder	labor representative
17	Employer	
18	Retiree	
19	MainePERS Member	
20	MainePERS Member	
21	Other Stakeholder	President of an organization that represents MEA-Retired interests
22	Employer	
23	Other Stakeholder	Appointed
24	Employer	
25	MainePERS Member; Employer	
26	MainePERS Employee; MainePERS Member	
27	MainePERS Member	
28	MainePERS Member	
29	MainePERS Member	
30	MainePERS Member	
31	Employer	
32	Retiree	
33	Employer	
34	Employer	
35	Employer	
36	MainePERS Member	
37	Retiree	
38	MainePERS Member	
39	MainePERS Member	
40	MainePERS Member	
41	Employer	
42	Other Stakeholder	Family member of a disabled retiree
43	MainePERS Member	
44	Employer	
45	Employer	
46	MainePERS Member; Employer	
47	MainePERS Employee	
48	MainePERS Member; Employer	
49	Employer	
50	Employer	

51	Employer	
52	MainePERS Member	
53	Employer	
54	Employer	
55	MainePERS Member	
56	MainePERS Employee; MainePERS Member; Other Stakeholder	Soon to be a Retiree!
57	Employer	
58	Employer	
59	MainePERS Employee; MainePERS Member; Employer	
60	MainePERS Member; Employer	
61	Retiree; Other Stakeholder	Labor Representative
62	Employer	
63	MainePERS Employee	
64	Employer	
65	Employer	
66	Employer	
67	Employer	
68	MainePERS Employee; MainePERS Member	
69	MainePERS Member	
70	MainePERS Member	
71	MainePERS Member	
72	MainePERS Member; Employer	
73	MainePERS Employee; MainePERS Member	
74	Retiree	
75	MainePERS Member	
76	MainePERS Member; Employer	
77	MainePERS Member	
78	Retiree	Non-profit Organization for MainePERS retirees
79	MainePERS Member; Employer	
80	MainePERS Member	
81	Retiree	
82	MainePERS Member; Employer	
83	MainePERS Member	
84	Employer	
85	MainePERS Member	
86	MainePERS Member	
87	Employer	
88	MainePERS Member; Employer	
89	Employer	
90	Employer	
91	MainePERS Member; Employer	
92	MainePERS Member	
93	MainePERS Member	
94	MainePERS Member	
95	MainePERS Employee	
96	MainePERS Employee; MainePERS Member	
97	Other Stakeholder	
98	Other Stakeholder	Spouse of a disabled MainePERS retiree
99	Employer	
100	Employer	
101	MainePERS Member; Employer	
102	MainePERS Employee	

103	MainePERS Employee	
104	Other Stakeholder	MSEA-SEIU Local 1989 Retiree Steering Committee
105	MainePERS Member	
106	Retiree	
107	MainePERS Member	
108	MainePERS Member; Employer	Represent an employer and an I am a member
109	Employer	
110	Other Stakeholder	Union Leader - President of PFFMaine
111	MainePERS Employee	
112	MainePERS Member; Employer	
113	MainePERS Employee; MainePERS Member	

### Q3 The Mission and Vision statement above reflect my expectation of MainePERS.

Answered: 96 Skipped: 17

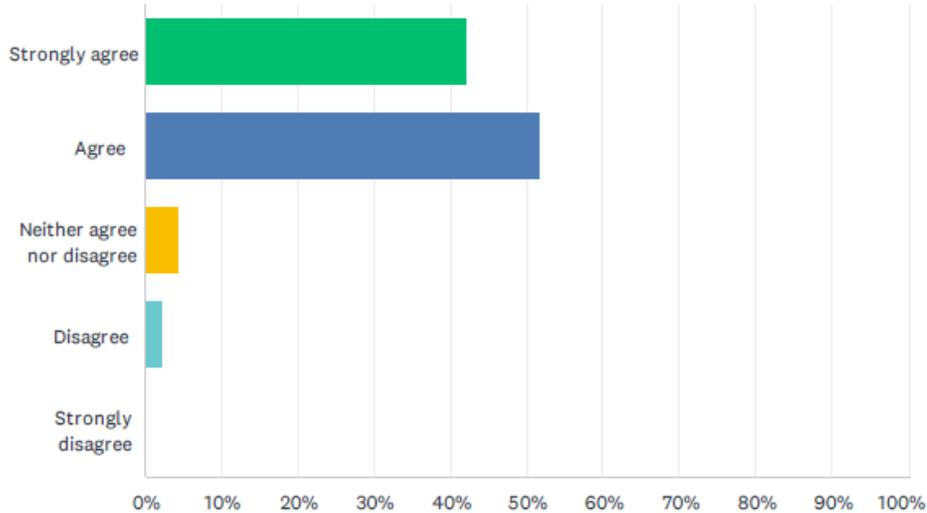


ANSWER CHOICES	RESPONSES	
Strongly agree	46.88%	45
Agree	43.75%	42
Neither agree nor disagree	8.33%	8
Disagree	1.04%	1
Strongly disagree	0.00%	0
Total Respondents: 96		

Response # *	Q3: Please share any comments or feedback on the Mission and Vision statements:
12	Mission: suggested change to "...retirement and retirement-related services" to be more clear in what 'related services' are.
13	Key to this will be the continued long-term benefits to Maine's retirees, including advocacy politically for the promises made (inherent) in the system. This is a strong program with a strong history and political meddling from any group would be a problem (overfund, or underfund...).
21	Partners is the key word. That means employers and employees work together. Correct?
24	I have not found the organization as a whole to place much emphasis on meeting the needs of employers. While personal interactions with your staff are on the whole fantastic, the setup of the organization is antagonistic and at times hostile and oblivious to the needs of an employer.
30	The Maine Retirement System has been a good steward of the pension system.
36	Good, clear mission and vision.
74	Mission Statement seems to be more a statement of fact rather than a mission. My idea of the mission: The mission of MainePERS is to create and preserve a trust fund sufficient to ensure members that benefits will be available upon retirement. Vision Statement. Just a matter of semantics. MainePERS as a trusted, etc.
76	Need to be aware of different Organizations in the system's needs. The outside crews have abused their bodies for the job and need to be able to retire before 65 but are not disabled so cant
78	The Mission should be broaden to include members, MainePERS retirees and beneficiaries.
88	I like the vision statement. The mission statement doesn't seem to reflect the critical role MainePERS plays in the well-being of retirees.
98	The Mission and Vision statements echo past agency statements such as found in the MainePERS 2017 Strategic Planning Projects list and on page 11 of the January 23-27, 2017, Disability Retirement Intake & Application Kaizen, which also echoes with "Guiding Principles" referencing "trust," "integrity," apply "standards = laws and policies," "providing the right information," etc. On the ground, operationally, they are not measured. Progress reports not issued. Issues raised are ignored or denied unilaterally.
104	No Comments
108	I think that the mission statement could be loftier. Maine Pers partners with public employers to help our members build retirement security. (something like that)
* Only respondents submitting comment in response to this question are included	

### Q5 The Organizational Values stated above reflect my expectations of MainePERS.

Answered: 95 Skipped: 18



ANSWER CHOICES	RESPONSES	
Strongly agree	42.11%	40
Agree	51.58%	49
Neither agree nor disagree	4.21%	4
Disagree	2.11%	2
Strongly disagree	0.00%	0
<b>TOTAL</b>		<b>95</b>

### Q6. Please share any comments or feedback on the Organizational Values

Response # *	Please share any comments or feedback on the Organizational Values:
1	I think they are representative of many of our current values, but also include some which we can strive towards. I like them.
13	Values are strong. Same comments as above.
15	Focus on pensions, not politically correct commentary.
18	Doesn't MainePERS also advocate for improvements to benefits for active and retired members with State and Federal legislative bodies, or is the organization neutral?
24	Much as the weather in Maine, if you wait a minute it will change. So is our expectation of MainePERS, ask tomorrow and you'll get a different answer. Education offered to Employers is slim to none.
41	The only comment I have is that the value of "agility" is not really compatible with the sentence following it. Agility is to move quickly or easily or to think and understand quickly. Neither of those definitions has deals with striving for excellence through continuous improvement. I suggest that either a different value or different tag line be determined so that they are congruent and, thus, the value is more clear and meaningful.
53	Need to collaborate with users of the Employer portal when planning updates to the software.
63	Maybe use members vs. constituents?

81	In regards to #2 Respect: Since you already have the word respect as a heading you could consider this change - Instead of "we respect individuals" it could read, We strive to understand and accept all individuals.
88	The description of agility doesn't match the word. Agility would seem to be necessary with the frequent changes to investment opportunities. Continuous improvement is also essential but I don't think continuous improvement equals agility.
98	As mentioned above, similar aspirational statements have been made by the agency for years, yet the employees demonstrate with impunity that their procedures and decision making are not deserving of trust or confidence. Wanton actions impacting the rights of members go unchecked by the legal department. Our family's MainePERS experience over four- and one-half years so far has demonstrated that the appeals and disability employees and the five levels of attorneys who oversee the work do not act with honesty, integrity, or transparency. Moreover, when issues are brought forward to the Board of Trustees through rulemaking, the Board of Trustees are non-responsive, and employees are not held accountable for their unlawful actions managing the cases of ill and disabled members. In fact, just a month before my husband's December 2017 application was approved by the Disability Specialist in September 2018 on trumped-up findings complete with a clandestine, yet written, plan to discontinue the benefit months later, Maine Superior Court Justice Mikayla Murphy ruled in the Terrence Marks v MainePERS case that the agency was abusing its discretion. The Board Counsel, General Counsel, Deputy Executive Director (now Director of Member Services), System Representative, and Hearing Officers that we dealt with are all attorneys, yet these attorneys demonstrably are not fulfilling their ethical and specific job responsibilities to ensure MainePERS employees follow transparent procedures which comply with our state and federal laws. How will the stated Organizational Values translate into specific measures to ensure the agency's procedures comply with state and federal laws? I have presented numerous examples in my husband's case to both MainePERS and the Legislature which must be addressed. I have requested the agency engage in Consensus-Based Rulemaking to redeploy the responsibilities of the now defunct MainePERS Medical Board. The answer from MainePERS Board of Trustees has been silence. Nothing to see here.
104	No Comments
108	I think they are well written but the word agility conjures up visuals other than what you are trying to convey.
111	The values make me proud to be part of such an organization
113	What is being done to protect employee investments during this national financial crisis, apres covid and Russia / Ukraine wars?
<i>* Only respondents submitting comment in response to this question are included</i>	

**Q7. Please provide your feedback on any parts of the MainePERS Strategic Plan. (If you are recommending specific language changes, please identify the section you are referencing.)**

Response # *	Please provide your feedback on any parts of the MainePERS Strategic Plan. (If you are recommending specific language changes, please identify the section you are referencing.)
12	Perhaps include an explanation for why a mandatory long-term disability plan is necessary; I don't clearly see the direct relationship between providing a retirement and/or life insurance benefit to providing a long term disability benefit. Seems like mission creep.
13	I like it - simplicity.
16	I have concerns about two elements of the strategic plan. First, I am concerned that in at least two places MainePers is advocating for a new pension system that is Social Security based. For example, this is listed as an objective at the bottom of page 1, but I have a bit of discomfort seeing MainePers advocate for a different pension system, especially when every effort we have completed in this regard over the past 10 years has resulted in a model plan that is more expensive with less benefits compared to our current plan. Instead of focusing on the move to a new plan, I wonder if MainePers and its members would be better served to focus its attention on providing a secure retirement benefit that provides portability for short term eligible public employees while providing a retirement benefit they can rely on for career public servants. I am concerned the focus has changed to plan redesign rather than having a plan that provides necessary and stable retirement benefits for workers. Second, in a few

	places the strategic plan mentions the need to develop a plan for long term disability. I want to +1 this statement. This past session we were successful in passing major changes to the disability plan, but the fundamental issues remain and without action we could see the same or similar issues arise again with our current system. A mandatory long term disability system is critical and will help solve problems. Happy to talk more about either issue if I can be helpful.
21	N/A at this time
29	I think the issue of collecting social security upon retirement in addition to school retirement should be allowed if one has put the time in to qualify for both.
36	Good investment strategic is key, along with protecting the defined benefit plan. Not sure what "member-centric" would look like, but if it improves the ability to get more information about retirement, that would be welcome.
41	See #6 above.
53	Monthly billing is limited to PDF versus Excel for financial reconciliations. Would like to see a summary billing (July through June.) Please update software so I'm not rounding pennies each month for the Group Life billing report.
74	It would be helpful to explain what is meant by the term "stakeholder" and by the term "member." Since by statute "member" does not include retirees, perhaps "member" should be defined as including active and retired Maine public service employees and beneficiaries. For example, Goal IV, E and G. Member and retiree and beneficiaries' self-service portal. Stakeholders, members, retirees and beneficiaries. Goal V, same concern. Key Performance and Risk Measures, V. future benefits owed to members, retirees and beneficiaries.
78	Throughout the plan, the term member is used. This need to be defined and retirees and beneficiaries need to be including in all objectives and activities.
79	You asked for my opinion....I typically don't do this but..... Mission -The "and related services" is weak. Try taking out, just state "retirement related services". Everything MEPers does is around retirement Vision - There are too many "ands". Try-Continuously be a trusted, effective fiduciary focused organization, which meets the needs of all members. MainePERS only works for members regardless of member status, retire active disabled. The accountability statement needs to be redone, it talks about services not how MEpers will be accountable to members. Where is trust, transparency and responsibility? The respect statement need a rewording, Try - We are mindful of individual cultures and diversity in all we do by exercising empathy, respect, compassion and kindness for everyone. This covers members and employees The Collaboration statement - take some of the wording from the accountability statement, which talks about service delivery.
93	I would be glad to see these statements come to fruition. MEPERS is struggling SIGNIFICANTLY to meet these expectations. There is little to no transparency, there is even less consistency and there appears to be no accountability to the MEPERS members.
96	Bullet list of goals only includes 5, but the expanded descriptions later in the document shows 6 goals. Goal 6, Foster an engaged Workforce, isn't included in the list on page 1. It needs to be.
98	No goals or objectives are mentioned for the appeals program and the only mention of the disability program FOR THE NEXT FIVE YEARS are, first, to include in the regular, Annual Report to the Legislature of the member experience after eliminating the MainePERS Medical Board and hiring UMASS in August 2020. However, disbanding the Medical Board addresses only the tip of the iceberg of the ethical and legal issues with the procedures of MainePERS disability and appeals programs. Second, according to the Draft Strategic Plan, considering all the issues I have brought forward, all MainePERS will do over the next 5 years about the disability program is what they have done since spring 2016 when LD 1463 became law? MainePERS is going to keep "exploring" requiring employers and employees to purchase additional disability coverage?? This Long Term Disability insurance "idea" became law and has served as a distraction—exactly as MainePERS Disability Task Force member and General Counsel for Maine Education Association, Andrew Mason, foresaw in January 2016 when he testified on LD 1463 (127th) "An Act ... To Direct the Board of Trustees of the Maine Public Employees Retirement System To Explore the Feasibility of Offering Long-term Disability Insurance Coverage." Mr. Mason said, in part, "We are concerned with the fact that this proposal [LTD insurance] did not come from the Disability Task Force as a recommendation and fear that, if approved, it has the potential to be pointed to as a solution that could curtail further evaluation of MainePERS by the Task Force. MainePERS convened this task force with varying stakeholders and still no recommendations have come forth." Looking back from 2022, Mr. Mason predicted exactly what happened. The result was more years of pain and suffering to real people, members of MainePERS, at the hands of

	unethical MainePERS employees while the MainePERS legal department and Board of Trustees look the other way and outsource policymaking to Hearing Officers.
104	Goal I.C: Need to ensure that money stays within the State and Teacher pension system. Goal III.C: Concerns expressed with regards to security of cloud-based system. Goal IV.E: Hopeful that this will reduce delay in providing retirees final pension benefit, upon retirement. Goal V.E: Significant concerns about the possibility of switching to a Social Security based system, such as increased costs to employers, Social Security system is "means " to lower wage workers, etc.
111	I feel the goals are very focused and well thought out, and I believe we will achieve all objectives. The goals, collectively and individually, encompass our mission and vision; and I do believe fostering an engaged workforce is key to our success.
* Only respondents submitting comment in response to this question are included	

**Q8. Please provide your feedback on any part of the MainePERS Strategic Plan**

Response # *	Please provide your feedback on any part of the MainePERS strategic plan:
13	I like it. Simplicity.
16	I think I provided the feedback in the previous question.
20	I agree more education for employers and employees to understand MEPERS and importance of saving
21	What happened to the defined benefit plan?
24	There has been no recognition or allowance for the fact that since Employer Self Service was implemented, ALL of the work for onboarding has shifted to the districts. You have increased our workload significantly over the years, but as you can imagine none of the towns have increased or staffing to allow for this. I understand why you did it, but there has been no support or acknowledgement of this. And your expectations for timeliness are aggravating, and at times offensive. You are set up to be completely oblivious to our workloads, and the way you have added to it.
33	No offense to everything you guys are doing. All I'm worried about when it comes to my retirement program is that it's there when I need it and then it will support me the rest of my life
40	I am a relatively new employee in Maine and I don't know how MainePERS works. Not anybody's fault really. We don't do a good job if outlining retirement benefits for Social Security either.
41	Overall, it is clear and hits the main aspects that an employer would want to see from its pension provider.
48	Good to see a Strategic Plan in place
56	The current text is good but I would like to see a greater effort on communication and written resources on the rules of the plan. When we must cull through newsletters for reminders on the latest rule changes it is difficult - a better developed knowledge base for employers would be extremely helpful. The ESS focus is on process - not rules. There have been occasions when I have made repeated calls for clarification and received entirely different responses from Maine PERS staff on correct rule interpretation.
74	See above.
78	Throughout the plan, the term stakeholder is used without definition. Stakeholders need to include retirees, beneficiaries and organizations representing these individuals.
79	I think the plan is a good foundation for moving forward.
98	The Draft Strategic Plan states that MainePERS "engaged in a series of discussions with a broad spectrum of stakeholders to assess their experience with MainePERS." Who was invited? Who participated? When and where did these discussions take place? I have asked many times to be added to the list of MainePERS stakeholders.
103	Within "Goal VI: Foster an Engaged Workforce that Advances the Organization's Objectives" these overall read as top-down efforts (even though probably not meant that way). I think it's important to regularly keep eliciting ideas and feedback from staff within each unit and department. To make listening part of the culture, and feed improvements using bottom-up experiences and input.
108	I am excited about a client portal.
111	I would very much enjoy being a part of a staff working group to advance positive organizational culture.
* Only respondents submitting comment in response to this question are included	

**Q9. Is there any other issue or initiative that you would suggest be included in the plan?**

Response # *	Is there any other issue or initiative that you would suggest be included in the plan?
1	Everything is well covered.
13	Yes - I believe there are cost-cutting measures that could be made that are similar to what we've done at schools. Color printing, mailings (move to digital), etc. Where I wouldn't cut is customer service, as it's such a pivotal time when an employee retires, or needs assistance while retired.
18	Improve the clarity and timeliness of legislative reporting on legislative bills that have any effect on or changes to MainePERS programs and benefits for active and retired members.
21	Is Maine PER's phasing out the defined benefits?
24	We need an employee import function, to onboard and terminate new staff. One at a time is laughably time consuming. Employees need to be able to directly report beneficiaries and acknowledge the windfall elimination provision. We need constant trainings. Staff turnover at the district level provided with minimal training from MainePers leads to many mistakes. We just discovered that because we are all self-training our replacements we have been addressing coaches incorrectly for 20 years. Workshops. Peer Review. Anything would be better than nothing. I have been so fortunate with my support person at MainePers, but she has left and I can feel the hole already. We shouldn't be dependent on the individual personality and work ethics of your staff to receive good information, you should have better systems in place.
29	I think the issue of collecting social security upon retirement in addition to school retirement should be allowed if one has put the time in to qualify for both.
30	I hope the Trustees will protect the defined benefit program which many of us are counting on for retirement.
40	One page explanation of what you do for Maine public employees.
41	No.
48	No
56	See above.
57	No
60	None
74	There is no mention of life insurance.
78	Under Objective, the planning for "potential public plan options" need to include other options not just social security. Goal IV, G. Needs to expand stakeholders experience in all of the MainePERS programs not just disability. Throughout the plan, references do not include group life insurance, survivor services and tax-deferred retirement savings programs.
87	Allow term dates that are past the current date. Allow uploads of files prior to the last payroll date. Both would alleviate having to table/wait until later to get the tasks done and would most likely result in more timely filing of information that MainePERS needs... Ex: retirees & terminated ee's (employees)...
96	We need to have a much more thorough editing process before putting documents out to the public. Page 1 of this survey has a typo in it that shouldn't make it through the editing process. Qualifying MaineEPRS employer is an option to select as how someone taking this survey is associated with us.....
98	The plan lacks measurable outcomes specific to addressing the many issues with the procedures of the disability and appeals programs. How will the Organizational Values translate into specific measures to ensure the disability and appeals program procedures and employees comply with state and federal laws? How does this Strategic Plan relate to the work plan of the Director of Special Projects who "assists in analyzing organizational and division performance of System goals" and "Plans, implements and evaluates strategic and work projects ensuring consistency with System strategy and goals." ?
108	Overall, i think it is well done, concise and understandable.
113	Assurance that our retirement contributions are secure and will be available when we are ready to retire.
* Only respondents submitting comment in response to this question are included	

**Q10. Please share any other comments or feedback**

Response # *	Please share any other comments or feedback:
5	Provide quarterly, semi-annual or annual statements that tell members the amount of money and/or potential pension they might receive. This would make retirement planning much easier. I've never seen a company not provide statements to its employees. It's almost like it's hidden from employees on purpose.
11	On a different topic. I think the 20 year retirement should only be available for first responders after age 55 or 60. Now that the retire-rehire option is in place I see the potential for departments to become all rehire personnel - I would think that would negatively affect MPERS in the long run. I think MPERS is a great benefit and asset to our ability to hire so I want it to be around forever!
12	Clearly a very thoughtful and comprehensive plan!
13	Thanks for the opportunity to provide feedback.
17	OTHER TOPIC: You have put all the work on the employer which has increased our work load which MEPERS used to do. I feel like we are doing your work for you.
30	More information about retirement benefits on a regular basis would be helpful in knowing what to expect and planning.
33	Please make sure that this program is still affordable and not taking away from my income now but still builds towards my future in the best way possible for my retirement.
36	Thank you for asking for comments.
40	Thanks for being prudent and embracing the full humanity of your employees.
41	Thanks for giving us the opportunity to review the draft plan and provide feedback.
53	When a member's status change (i.e. no prior bases to bases), employers should be notified or able to access a data base.
63	Great job by everyone. Thank you for including staff in this process.
74	Excellent initiative, strategic planning essential for effective organization. As noted in June Board of Trustees meeting, it is important that many ways and means be developed and made available for members, retirees and beneficiaries to learn about the work of MainePERS.
78	This is an excellent beginning to this process and commend MainePERS for the effort. MAR is ready and willing to participate in any way possible to assist MainePERS in their efforts.
81	Nicely done! Clearly a lot of time and thought was put into your process. Very thorough, clear and concise. So much content yet simple to read through and understand. You've used wording that gives many level of readers a clear understanding of your strategic plan. Thank you
87	I have been working with MainePERS for over 20 years and have always been impressed with the level of service that your technicians provide when called or emailed... Keep up the good work!
96	Really appreciate the effort and work done so far to include everyone in this process and hope we can continue to make improvements.
98	MainePERS must address the many issues with agency procedures through a transparent, public process.
104	More detailed notes from the meeting participants will be emailed.
111	Some of the recent perks I believe have made a difference in our culture (i.e., complimentary coffee/cream in the kitchen, lands' end store [for purchase of a MainePERS branded collared work shirt], whoopie pies, debit cards for medical reimbursements, coloring book on the wall by the kitchen) are much appreciated.
* Only respondents submitting comment in response to this question are included	

**Appendix 1: MainePERS Draft Strategic Plan Feedback Provided By MSEA-SEIU, Local 1989 Retirees Steering Committee****MSEA-SEIU, LOCAL 1989  
RETIREES STEERING COMMITTEE ZOOM MEETING  
June 22, 2022**

Meeting called to order by Ginette Rivard, Chair @ 10:01 AM.

**Members present:**

Ginette Rivard, Steve Butterfield, Bob Ruhlin, Peggy Rice, Penny Whitney-Asdourian, Mary Peabody, Ray Dzialo, Ben Conant and Calvin Hall.

The purpose of this special meeting is to review the materials provided by MainePERS on the Systems 5-Year Strategic Plan.

**Draft Mission Statement:**

No comments

**Draft Organizational Values:**

Mostly about the internal MAINEPERS staff. No comments.

**Draft Strategic Objectives:**

Preservation of the Trust Fund:

Steve noted that Item C in this objective will be about the pot of money that will become available once we have fulfilled the requirements of the 1996 Unfunded Actuarial Liability. We need to make certain that money stays within the State and Teacher pension system. This will take place near the end of the next Governor's term.

**Stability of Contribution Rates:**

Some discussion about coordinating with MainePERS and the other public sector unions about 2028 and paying off the 1996 UAL. There have also been discussions about shifting to a Social Security-based system. If that happens there would be a "soft close" of the current pension plan which would put all new employees in the Social Security based system and no new hire payroll contributions would be going into the current pension plan. That will mean we need to get additional funding to sustain the demand on the pension plan for current participants ongoing benefits.

**Security and Integrity of our Information Systems:**

This is an internal MainePERS issue about how they protect and store the data.

**Cultivation of Member-centric Organization:**

Again, this is mostly an internal staff issue. Very positive they want to develop a comprehensive customer communication and service model. This should reduce the period (currently about 6 months) that a pension recipient actually gets verification of the final pension benefit. Several questions about the proposed member self-service portal mentioned in Item E. regarding how it would function and provide results.

**Development of Stakeholder Relations:**

Talked about Social Security and how that can get impacted by acts of Congress. Steve noted previous conversations about moving to a Social Security based plan have centered on increased costs to the State based on Social Security employer contributions. Some discussion about State using the pot of funds that becomes available once the 1996 UAL is paid off in 2028 to transition to the Social Security based plan. Steve also noted that the Social Security System is “means weighted” to provide higher benefits for lower wage career State workers versus the higher wage career State workers and participants would potentially make less under the Social Security based plan as compared to the current plan. Are there options that could keep this from occurring?

**Foster an Engaged Workforce that Advances the Organization’s Objectives:**

Much of this is internal staff issues. No comments.

**Draft Key Performance and Risk Measures:**

No comments.

**NEXT REGULAR MEETING WEDNESDAY, JULY 27, 2022 AT 10:00 AM via Zoom.**

Motion to adjourn by Peggy Rice, second by Ben Conant. PASSED. Meeting Adjourned at 10:46 AM

Respectfully submitted,  
Penny Whitney-Asdourian