



DIRECTIONS: Pre-Retirement Planning Seminars *October 2013-January 2014*

The 13 fall seminars ended on December 19, 2013 and planning is underway for spring 2014. A back to back Manhattan seminar and fourth Albany seminar have again been included in the schedule for the spring. Revisions to the *Self-Help Guide* and seminar power points were made in December.

Due to the federal shutdown, there were no social security speakers for the October 2 and October 8 seminar as previously reported. However, speakers were present at all remaining seminars and are expected for the spring 2014 seminars.

Fall 2003–December 2013 Service to Executive Branch Employees

Dates	# Of Seminars	CSEA	PEF	M/C	UUP	NYSCOPBA	C82	DC37	Other	Total
Fall 2003	10	331	559	196	-	-	-	-	9	1,095
2004	36	1,502	1,908	787	61	177	17	30	33	4,515
2005	32	1,206	1,819	644	73	133	15	2	54	3,946
2006	38	1,608	2,391	766	49	287	21	12	98	5,232
2007	18	693	1,047	241	23	65	5	3	92	2,169
2008	16	619	908	314	43	114	2	16	36	2,052
2009	24	722	1,138	356	12	255	0	2	123	2,608
2010	27	697	1,311	318	27	298	23	4	1,797	4,475
2011	26	743	1,386	284	0	263	39	7	80	2,802
2012	24	694	1,253	277	0	229	35	9	22	2,519
2013	24	868	1,402	401	0	213	34	4	46	2,968
Total	275	9,683	15,122	4,584	288	2,034	191¹	89	2,390²	34,381³

¹ NYSCOPBA and Council 82 employees also served at customized, worksite seminars coordinated by WLS staff where DOCCS handled registration

² Union affiliations not always available as this total includes two large 2010 incentive seminars for which agencies did registration and in 2011 there were 80 attendees not able to be registered in SLMS.

³ Attendees at customized, agency-specific seminars for which staff provide assistance not included in total above.

**Overall Participant Evaluation Summary for Fall Seminars*
September 26, 2013 – December 19, 2013****

Seminar	# of Evals	SSA Content	Health Ins. Content	NYSDCP Content	Pension Content	Support Materials	Recommend to Others	Info Helpful w/ Retirement
9.26.13 Rochester, NY	106	4.10	4.49	4.43	4.60	4.56	4.60	4.51
9.30.13 Albany, NY	109	4.13	4.45	4.18	4.66	4.48	4.56	4.52
10.2.13 Long Island, NY	88	3.85	4.47	4.29	4.72	4.57	4.62	4.57
10.8.13 Buffalo, NY	94	3.68	4.32	4.31	4.54	4.40	4.41	4.43
10.16.13 Tarrytown, NY	63	3.81	4.08	4.01	4.53	4.61	4.68	4.68
10.25.13 Albany, NY	110	3.89	4.41	4.30	4.71	4.69	4.67	4.59
11.5.13 Albany, NY	117	4.16	4.59	4.39	4.67	4.62	4.65	4.58
11.14.13 Lake Placid	82	3.89	3.96	4.32	4.44	4.47	4.43	4.30
12.12.13 Albany, NY	115	3.70	4.54	4.53	4.47	4.60	4.67	4.60
12.18.13 Manhattan, NY	96	3.68	4.47	4.46	4.62	4.51	4.61	4.56
12.19.13 Manhattan, NY	73	3.89	4.54	4.49	4.70	4.64	4.65	4.55
Average	1,053	3.88	4.39	4.33	4.60	4.55	4.59	4.53

5 is the highest rating on the participant evaluation forms
 SSA = Social Security Administration
 NYSDCP = New York State Deferred Compensation Plan
 5 is the highest rating on the participant evaluation forms

*In fall 2013, we began using a revised evaluation form.

** At the October 18,2013 Advisory Board meeting, we reported on the first two fall seminars that were held in Binghamton and Syracuse, so they are not included above.