



## DIRECTIONS: Pre-Retirement Planning Seminars June 2013-September 2013

Thirteen DIRECTIONS: Pre-Retirement Planning Seminars have been planned for the fall 2013 series beginning September 5 and ending December 19. Two seminars have been planned for Manhattan and a fourth seminar has also been planned for Albany. Revisions to the *Self-Help Guide* and seminar power points were made over the summer to include updated information.

Two enhancements have been added to the Pre-Retirement Planning section of the Work-Life Services website [www.worklife.ny.gov](http://www.worklife.ny.gov). Employees may now print out a copy of the power points used for Civil Service and Deferred Compensation (OSC and Social Security are not available) to bring to the seminar. In addition, we have added the *Agency Liaison Contact List* to assist employees with registering for the seminars.

The Employee Benefits Division of Civil Service has decided to send presenters to the seminars beginning this fall. Last spring, they only sent a speaker to the Albany seminars, but will now send speakers to all of the seminars, statewide. This will be most appreciated by participants as it will allow them to ask questions and receive further clarification. We did not have a speaker from Social Security (SS) for the October 2 and October 8 seminars due to the federal government shut down; the seminar agenda was changed to incorporate three SS videos from our *Video Guide* library. Staff is in contact with Social Security to determine the availability of speakers for the remainder of the year.

Participant feedback from the last three spring 2013 seminars is included on the next page. The seminar evaluation form was revised and shortened beginning with the fall seminars, so a new summary chart for the first fall seminars is also attached.

### Fall 2003–September 11, 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	<b>1,095</b>
2004	36	1,502	1,908	787	61	177	17	30	33	<b>4,515</b>
2005	32	1,206	1,819	644	73	133	15	2	54	<b>3,946</b>
2006	38	1,608	2,391	766	49	287	21	12	98	<b>5,232</b>
2007	18	693	1,047	241	23	65	5	3	92	<b>2,169</b>
2008	16	619	908	314	43	114	2	16	36	<b>2,052</b>
2009	24	722	1,138	356	12	255	0	2	123	<b>2,608</b>
2010	27	697	1,311	318	27	298	23	4	1,797	<b>4,475</b>
2011	26	743	1,386	284	0	263	39	7	80	<b>2,802</b>
2012	24	694	1,253	277	0	229	35	9	22	<b>2,519</b>
2013	13	511	738	233	0	141	25	1	19	<b>1,668</b>
<b>Total</b>	<b>264</b>	<b>9,326</b>	<b>14,458</b>	<b>4,416</b>	<b>288</b>	<b>1,962</b>	<b>182<sup>1</sup></b>	<b>86</b>	<b>2,363<sup>2</sup></b>	<b>33,081<sup>3</sup></b>

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

<sup>2</sup> 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.

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

**Overall Participant Evaluation Summary for Remaining Spring Seminars  
May 29, 2013 – June 19, 2013**

Seminar	# of Evals	SSA		Health Ins		NYSDCP		Pension		Q & A	Materials	Facility	Overall
		Content	Pres	Content	Pres	Content	Pres	Content	Pres				
5/29/13 Albany, NY	118	4.25	4.11	4.60	4.53	4.46	4.56	4.72	4.74	4.44	4.63	4.34	4.60
6/6/13 Manhattan NY	96	4.13	4.07	4.32	4.33	4.32	4.33	4.65	4.65	4.21	4.66	4.37	4.56
6/19/13 Rochester, NY	107	3.82	3.55	4.08	3.96	4.31	4.36	4.48	4.52	4.16	4.36	4.44	4.36
<b>Average</b>		<b>4.06</b>	<b>3.91</b>	<b>4.33</b>	<b>4.27</b>	<b>4.36</b>	<b>4.41</b>	<b>4.61</b>	<b>4.63</b>	<b>4.27</b>	<b>4.55</b>	<b>4.38</b>	<b>4.50</b>

Pres = presentation

SSA = Social Security Administration

NYSDCP = New York State Deferred Compensation Plan

5 is the highest rating on the participant evaluation forms

**Overall Participant Evaluation Summary for Fall Seminars\*  
September 5, 2013 – September 11, 2013**

Seminar	# of Evals	SSA Content	Health Ins. Content	NYSDCP Content	Pension Content	Support Materials	Recommend to Others	Info Helpful w/ Retirement
9/5/13 Binghamton, NY	79	4.24	4.30	4.49	4.60	4.60	4.68	4.54
9/11/13 Syracuse, NY	114	4.21	4.40	4.11	4.61	4.40	4.56	4.48
<b>Average</b>		<b>4.22</b>	<b>4.35</b>	<b>4.30</b>	<b>4.60</b>	<b>4.50</b>	<b>4.62</b>	<b>4.51</b>

5 is the highest rating on the participant evaluation forms

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