



DIRECTIONS: Pre-Retirement Planning Seminars March 2013-June 2013

Eleven DIRECTIONS: Pre-Retirement Planning Seminars were planned for the spring 2013 series beginning March 5 and ending on June 19. Revisions to the *Self-Help Guide* and seminar power points were made to include updated information. Except for the Albany seminars, the *Planning for Retirement* video from Civil Service was used in place of a live speaker. While the video is of high quality, feedback continues to demonstrate participants' desire to be able to speak with an expert from Civil Service at the seminars.

During July and August when there are no seminars, the fall 2013 series will be planned. Eleven to twelve seminars will be planned statewide. The *Self-Help Guide*, the Pre-Retirement Checklist, and the powerpoint presentations will all be updated, including those documents that are on our website.

The Work-Life Services website also offers 22 short videos which provide highlights from the seminars. Staff is working with the partner agencies and NYNet to update a number of the videos; two have been completed and posted and work is underway on seven others. There have been so many changes to health insurance for retirees that a new video is also planned.

Fall 2003–May 21, 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 ⁴	2,802
2012	24	694	1,253	277	0	229	35	9	22	2,519
2013	8	293	439	120	0	81	14	-	8	955
Total	259	9,108	14,159	4,303	288	1,902	171²	85	2,352³	32,368¹

¹Attendees at the customized, agency-specific seminars for which staff provide assistance are not included in the breakdown above.

²NYSCOPBA and Council 82 members are also served in significant numbers by the customized seminars WLS staff has coordinated onsite at correctional facilities, where DOCs has handled the registration.

³Includes two large 2010 incentive seminars; attendees were registered by each agency, so union affiliations are not available.

⁴Attendees unable to be enrolled in the SLMS therefore, unable to identify union affiliation

**Overall Participant Evaluation Summary for Spring Seminar Series
March 5, 2013 – May 21, 2013**

Seminar	# of Evals	SSA		Health Ins		NYSDCP		Pension		Q & A	Materials	Facility	Overall
		Content	Pres	Content	Pres	Content	Pres	Content	Pres				
3/5/13 Syracuse, NY	94	3.91	3.72	3.88	3.82	4.57	4.62	4.62	4.66	4.25	4.46	4.39	4.47
3/14/13 Binghamton, NY	84	4.29	4.34	4.02	3.96	4.35	4.51	4.51	4.58	4.35	4.49	3.74	4.37
3/27/13 Albany, NY	123	4.16	3.95	4.39	4.33	4.40	4.50	4.71	4.74	4.28	4.58	4.49	4.50
4/15/13 Albany, NY	109	4.08	3.87	4.60	4.53	4.44	4.62	4.68	4.68	4.56	4.67	4.41	4.60
4/25/13 Long Island, NY	87	4.58	4.60	4.48	4.46	4.17	4.14	4.73	4.76	4.51	4.74	4.43	4.62
5/9/13 Buffalo, NY *	-	-	-	-	-	-	-	-	-	-	-	-	-
5/14/13 Tarrytown, NY	89	4.11	4.13	3.91	3.69	4.04	4.00	4.43	4.40	4.39	4.52	4.44	4.34
5/21/13 Lake Placid, NY	91	4.38	4.30	4.16	4.06	4.44	4.42	4.65	4.67	4.49	4.64	4.64	4.57
Average		4.21	4.13	4.20	4.12	4.34	4.40	4.61	4.64	4.40	4.58	4.36	4.49

*Evaluations were inadvertently left out of the Buffalo seminar folders, so no feedback is available.

Pres = presentation

SSA = Social Security Administration

NYSDCP = New York State Deferred Compensation Plan

5 is the highest rating on the participant evaluation forms