

**Public Employees' Retirement Board  
June 11, 2015**

**Topic: Annual Benefit Notification Mailings**

Prior to January 2015, MPERA notified retirees of their annual change in benefit due to Guaranteed Annual Benefit Adjustments each January. In 2013 the Governor's office recommended the elimination of annual benefit notifications in an effort to reduce mailing costs. In January 2014, MPERA issued the final benefit change notifications and warned retirees that no additional notifications would be sent.

In January 2015, MPERA did not send change of benefit notifications and experienced a substantial increase in member calls requesting the information which necessitated the production of letters for the members use in order to provide the information to banks and other financial institutions, housing authorities etc.

Attached you will find a letter from the Association of Montana Retired Public Employees (AMPRE) asking for the notifications to be re-instated.

**Staff Recommendation:**

**Beginning January 2016, automatically generate change in benefit notifications to retirees. Once the PERIS system and the Member-Self Service portal are operational and retirees have been trained to access their own information, and generate benefit change letters, MPERA staff will re-evaluate the need to automatically generate this letter. Estimated cost to generate the annual letter to retirees is approximately \$2,263.01.**

**Board Motion:**

I move:

approve staff recommendation

Or

Board pleasure

\_\_\_\_\_  
Moved by

\_\_\_\_\_  
Seconded by

\_\_\_\_\_  
Vote



**Association of Montana Retired Public  
Employees**

P.O. Box 603 Helena, MT 59624-603

September 18, 2015

Director Sheila Hogan  
MT Department of Administration  
125 N. Roberts St.  
Helena, MT 59620-0101

Director Hogan,

On behalf of the Association of Montana Retired Public Employees (AMRPE) I wish to present our concerns regarding a process implemented by MPERA that does not allow for mailed notifications to retirees when benefits change or other events of importance occur. There are approximately 20,000 public servants who are concerned with actions effecting their benefits and health care. A significant number of these do not access or are not proficient with information technology.

We all understand the fiscal concerns with reducing mailing costs and automating systems. However we believe strongly that a responsibility remains to communicate fairly with those retirees who cannot skillfully use electronic means of information sharing. Surely a method can be devised to discover those within the umbrella of MPERS that need an alternate form of communication. In a world where accommodating physical disabilities is the norm, can we not also find an accommodation for those retirees who are technically challenged? This group will likely dwindle over time but until then they deserve respectful treatment for their service to the state.

Thank you for your consideration.

Cathy Kendall  
President, AMRPE

Cc: Dore Schwinden  
Sheena Wilson



Estimate#: 56172

State of Montana \* Department of Administration  
(406) 444-3053 \* 920 Front Street, Helena, MT

9/24/2015

ANN REBER  
ADMIN/PERD  
100 N PARK  
SUITE 200  
HELENA, Montana 59601

In reference to your request, please see below for the information regarding your print estimate:

MPERA LETTER

Preparation will vary depending upon complexity of the job and artwork/files that are supplied.

**Press:**

**Bindery:**

**Other:** Postage cost: \$17,550.00

**Paper:** Item:0001; 20# Bond 8.5 X 11"; WHITE -- 30,000 sheets

Item:0264; 24# Window #10 Envelopes White; WHITE -- 30,000 sheets

Quantity	Price
30,000	\$2,263.01

Thanks for your request, please refer to this estimate number when placing your order.

JM