



Firefighters' and Rescue Squad Workers' Pension Fund Advisory Panel

June 6, 2016

Operations Update

Tom Causey and Donna Boyette



North Carolina
Total Retirement Plans



2015 Rosters and Turnaround Documents (TADS)

- 2015 Rosters were successfully uploaded into ORBIT on January 31, 2016.
- Mid February - generated 1,516 TADs out to agencies. 146 TADs were not generated because we were in the process of posting 2015 contributions for these agencies. After posting, agencies are issued an updated TAD.
- 85% of the Fire & Rescue departments submitted contributions in advance of the March 31 deadline.
- Agencies that submitted contributions after the deadline were given three choices: 1) post money to accounts to apply as contributions for future years; 2) purchase the 2015 contributions; or 3) have the funds returned. No exceptions were granted in 2016.



Team Dynamics

- Fully staffed since April 2015
- Four full-time permanent employees
- One full-time temporary acts as “Anchor Man” for the phones
- Other staff spend 2 ½ hours on the phones each day
- Other time is spent processing cases, emails, correspondence, and Turnaround Documents
- One temporary brought onboard in late October 2015 to work a special project to be discussed in Status and Needs update

Team Metrics

	May 2014 – April 2015	May 2015 – April 2016
Task	Monthly Average:	Monthly Average:
Purchase calculation requests received	44	75
Purchase calculations Turnaround Time (TAT) (days)	133.1	13.4
Calls offered	875	660
Telephone Abandonment rate	11.3%	5.9%
Retirements received	80	67
Retirement TAT (days)	101.2	12.9
Retirements Paid in month requested	35.3%	98.9%
Deaths reported	40	64
Death TAT (days)	92.7	23.4
Refunds received	34	73
Refund TAT (days)	28.1	7.6
Turnaround Documents TAT (days)	8.1	7.9



Firefighters' and Rescue Squad Workers' Pension Fund Newsletter

An eNewsletter for members and units of the Firefighters' and Rescue Squad Workers' Pension Fund (FRSWPF)

- **First Issue launched on January 5, 2016**
- **Topics: Important dates/deadlines, Retirement benefits, Line of Duty Death Benefit, Why was the Fund established article**
- **The Newsletter opened with the “welcome” message below**
- **Annually issued right now, goal is to expand to semi-annually**

Welcome to Your eNewsletter!

Welcome to the first issue of the Firefighters' and Rescue Squad Workers' Pension Fund Newsletter. We want to take this opportunity to communicate important information and deadline dates, plus some fun facts, through this eNewsletter to all FRSWPF members, departments and squads for whom we have email addresses.

If you have any suggested topics of interest for future newsletters, or you want to add or update your email address to make sure you receive future FRSWPF communications, please contact us at NC.Fire&Rescue@nctreasurer.com.



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Thank you