



MEETING NOTES

April 11, 2013

In Attendance:

Anna Wainscott, DSS	Libbie Farrell, OA Accounting
Arlene Taylor, DOLIR	Lisa Verslues, MOSERS
Beth Oetting, PSC	Marian Buschjost, OA Personnel
Brianna Monroe, PSC	Maribeth Neidert, STO
Bryan Howard, DESE	Mari-Jo Wilkes, DNR
Carol Newgaard, SAO	Melissa Turner, DOC
Darlene Robinett, DOR	Meredith Curry, DHSS
Debbie Davis, DIFP Credit Unions	Michelle Jacobsen, DHSS
Donielle Lawson, MODOT	Peggy deMeurers, MSHP
Gina Hall, Public Defender	Penny Schrock, DSS
Guy Krause, OA Personnel	Sheryl Gregory, PSC
Jessica Opie, OA	Stacey Jacobs, STC
Kim Harris, MVC	Vicki Glenn, MGC
Kim Johnson, DOR	
Leda Edgar, DOC	

MOST (Missouri 529 College Savings Plan) – Janet Kottman

Janet Kottman discussed the MOST program and shared some of the benefits of saving for higher education.

Some staggering facts about higher education costs:

- The average annual increase in tuition costs is approximately 6%.
- College student loan debt is over a trillion dollars, which is more than the national credit card debt average.
- In 2011-2012, over 236.7 billion dollars was awarded in financial aid.

Information about MOST accounts:

- Open an account with \$25 or \$15 if establish withdrawals through payroll deduction.
- Anyone can open an account or contribute to an account – does not need to be related.
- Change account beneficiaries at any time.
- Employee controls how the plan is managed.

- There is no age limit that must be met when using the funds.
- Contributions are tax deductible.
- Contributions and earnings are deferred from federal and state income tax.
- Withdrawals for qualified expenses are tax-free.
- Investments are made in a diverse portfolio.
- Can select age-based options or manage own investments.
- 10% penalty if funds withdrawn for non-qualifying expense.
- Withdrawals are processed in a reasonable amount of time.
- Account is classified as parental asset on FAFSA, which is less impactful than a child's asset.
- **Matching Grant Program** offers an opportunity to have contributions into the plan matched up to a certain amount each year.
 - Application process applies.
- **Ugift** lets family and friends contribute to account through an easy online coupon system, perfect for holidays, birthdays, and graduation.
- **UPromise Rewards** is a separate account that links to the MOST program. UPromise Rewards sends a percentage of money spent on online purchases, dining rewards, and e-coupons to your MOST account.

Janet supplied a presentation that includes additional information, which is available on the SHRMC [website](#).

Benefits U – Lisa Verslues and Darlene Robinett

Lisa and Darlene discussed the possibility of bringing a different perspective to the Benefits U conference this year and asked agencies what information they needed in their offices. They asked for topic suggestion ideas for the upcoming Benefits U conference. Brainstorming took place regarding knowledge transfer, communication between benefit providers and agencies, resources, SAM II training, topic ideas, etc. The ideas were to be taken before the Benefits U committee for review.

In addition, the group requested that a HR Training work group be created to try and consolidate a training effort that will help transfer HR knowledge to new staff. If you are interested in participating on this work group, let [Darlene](#) know.

Lisa also let agencies know that Sally Hager and JoAnn Looten are available to visit agencies to train new HR employees. Contact Sally or JoAnn if you are interested in the training.

OA Accounting – Libbie Farrell

Fiscal year end is approaching. The annual fiscal year end memo was sent to agencies shortly after the meeting.

Libbie asked that all agencies with possible reorganizations taking place at fiscal year end, let [Randall Hutton](#) know, right away.

Libbie reminded agencies to complete all PACC adjustments soon, as May and June have tight timeframes for completion.

EASe Update – Marian Buschjost

Marian let the group know that ITSD is making some modifications to EASe, but indicated these changes will not affect the tables at this point. Additional changes will be made, with more information to follow.

OA Personnel – Guy Krause

A \$500 cost-of-living adjustment is proposed to take effect on January 1, 2014. Other job class adjustments will also be made.

A legislative update from OA can be found on the SHRMC [website](#) and is updated weekly.

Discussion took place regarding how agencies enter employee names into SAM II. It is requested that agencies use employees' social security card or birth certificate to ensure the legal name is entered into SAM II when hired.

OA has been tasked with reporting vacancies statewide. To accomplish this, Guy discussed a new initiative to help report on vacancies. OA will begin sending vacancy reports to agencies on a weekly basis.

Agencies were asked to:

- Place positions in *Hold Non-Budget* status on the PSMT, if the vacant position is not funded at the current time or there are no current plans to fill the position.
- Inactivate vacant positions that can be filled at a later date using simplified procedures.
- Inactivate positions that will not be filled.

The vacancy report is to be reviewed and updated with the status of positions each week. The report should be returned to OA, no later than Thursday of each week. At some point, this report may be posted on a website for all to see.

Statewide Policy Committee Update

The committee's statutory change recommendations to bereavement leave are still being reviewed.

The committee continues to review FMLA, in hopes of providing guidelines for more consistent application by agencies.

Next Meeting

May 09, 2013

Room 500 HSTOB

8:30 a.m. to 10:30 a.m.

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