



TMRS Annual City Conference

It's All About Service!
How TMRS Is Improving Service for You

Presented by:

Anthony Mills, Director of City Services

Debbie Muñoz, Director of Member Services

TMRS Overview

A New Look



A Retirement System for Texas City Employees Since 1948

- TMRS is a statewide retirement system covering the employees of 895 participating cities.
- Largest participating cities include San Antonio, Arlington, Corpus Christi, Plano and Laredo.
- 218,000 Members, retirees and beneficiaries.
- In 2020, TMRS paid \$1.5 billion in retirement benefits.
- Trust fund investments totaled \$34.5 billion as of December 31, 2020.

Flexibility for Participating Cities

- Each city chooses its own benefit design.
- Menu of benefit options: Member deposit rate, city matching ratio, retirement eligibility, Updated Service Credit, COLA and others.
- Cities can prospectively modify benefits to control costs.

Benefit Options

Benefit Option	Options Available	When effective
Employee Deposit Rate	5%, 6% or 7%	1 st day of any month
City Matching Ratio	1:1, 1.5:1 or 2:1	January 1 st of any year
Updated Service Credit	50%, 75% or 100% With or Without Transfers Ad Hoc or Repeating	January 1 st of any year
COLA	30%, 50% or 70% of CPI-U	January 1 st of any year
Vesting	5-Year or 10-Year	1 st day of any month
Retirement Eligibility	20-Year or 25-Year Any Age 5 Years or 10 Years Age 60	1 st day of any month
Restricted Prior Service Credit	Option to adopt	1 st day of any month
Buy-Back Provision	Option to adopt	Actual date of final adoption
Supplemental Death Benefit	Employees only or Employees and Retirees Option to adopt or terminate	1 st day of any month for adoption January 1 st of year for termination

FAQs for Finance Officers

- Where can I get my rate letter? tmrs.com/city_rate_letters.php
- Where can I run actuarial comparisons? tmrs.com/city_dashboard.php
- Where can I get the GASB 68 package? tmrs.com/GASB_Resources.php
- Where can I get my city's valuation census data for GASB 68/75?
tmrs.com/CityPortal/Logon
- Where can I find the TMRS SOC-1 Type 2 Report?
tmrs.com/CityPortal/Logon
- Who do I contact if I have questions regarding my GASB statements?
pensionaccounting@tmrs.com

Member Services at Your Service!

Combining Old and New Services

- During COVID-19 shutdown, we continued to provide services:
 - Member Service Center
 - Virtual meetings
 - Benefits processing never stopped
- The office has reopened, and travel has resumed.
- TMRS will continue to provide virtual services.

Member Communications

Communication	To	How	When
Member Account Statement	Members	Mail and MyTMRS	March
Retiree Benefit Statement	Retirees or Beneficiaries	Mail and MyTMRS	February
Member Benefit Guide	Members	Mail and website	Upon enrollment and 24/7 online
Popular Annual Financial Report (PAFR)	Members	Newsletter and website	Summer - Fall
<i>TMRS Times</i> (Newsletter)	Members	Mail, email and website	Spring and Fall
<i>TMRS RetirementWise</i> (Newsletter)	Retirees or Beneficiaries	Mail, email and website	Spring and Fall
General Member Information	Members, Retirees and Beneficiaries	Website	24/7
Regional Pre-Retirement Conferences	Vested Active Members	In person or virtual	Throughout the year
Benefit Fairs	All Members	In person or virtual	Upon request
Association Conferences (e.g., TCCA, TCAA, CLEAT and TMPA)	Member Association Groups	In person or virtual	Throughout the year

Member Services

- Member Service Center
 - Answer incoming phone calls and emails
 - Update Member data and provide data security
 - Generate Member retirement estimates
- MyTMRS (estimates, account updates, account information)
- Member benefit correspondence (e.g., New Member Confirmation, Vesting and Retirement eligibility notices)
- Member counseling
- Benefit fairs
- Pre-Retirement conferences
- Benefit processing

Member Service Center

- Committed to providing superior service to Members
- Member Service Center:
 - Call center Monday – Friday, 8 a.m. – 5 p.m.
 - Average wait time 30 seconds
 - Regional Managers: webinars, fairs and Member counseling
 - MyTMRS: Online Member portal available 24 / 7

Member Service Center

- Virtual Member Webinars
- Member Counseling
- Benefit Fairs
- Retirement Seminars
- Email correspondence

Member Services: Three Benefit Administration Teams

- Member Account Services
- Retiree and Refund Services
- Beneficiary Services

Who Provides Member Service?

- Director of Member Services – Debbie Muñoz
- Member Service Center Manager – Chad Nichols
 - Member Service Center Supervisors
 - Member Service Call Center Representatives
 - Member Service Center Regional Managers
- Benefits Administration Manager – Vikki Vasquez
 - Active / Inactive Member Team
 - Retirement / Refund Team
 - Beneficiary Team

City Services

Who Provides City Services?

New City Services Department

- Director of City Services – Anthony Mills
- City Services Managers
 - Administration/Communication – Colin Davidson
 - Contribution Reporting and Enrollment – Jennifer Andrews
 - City Contributions Team

TMRS and Participating Cities are Partners

- It's your city's plan.
- The TMRS City Services department was created in September 2020 to deliver superior service to participating cities:
 - Administration and ordinances
 - City contributions and reporting
 - City staff/council education and training
 - City Services' staff can meet with city administrators in person, or online via Teams, Zoom and GoToMeeting platforms

Participating City Communications

Communication	To	How	When
Annual City Conference	City Contacts	Virtual (2021)	July
Annual Rate Letter/Valuation	City Contacts	Email and website	June
GASB 68 Package and GASB 75 Package (if applicable)	City Finance Directors	Email and website	July
Comprehensive Annual Financial Report	City Contacts	Email and website	June
Personal Email Blasts	City Managers	Email	March & October
Invited City Visits and Presentations	City Councils, Administrators	In person or virtual	Upon request
<i>TMRS Main Street</i> (newsletter)	City Contacts	Mail, email and website	August
Videos (e.g., Introduction to City Services)	City Contacts	Email and website	24/7
Association Conferences (e.g., TML, TCMA, TMHRA, GFOAT)	City Employee Associations	In person or virtual events	Throughout the year
City Correspondent Certification Course	City Correspondents and Others	In person or virtual	Throughout the year
Welcome Letter	City Managers & City Councils	Letter	When a city joins TMRS
News for Cities (e-bulletin)	City Contacts and Subscribers	Email and website	At least quarterly and as needed
General City Information	City Contacts	Website	24/7

City Services' Proactive Communication Efforts

- New cities receive Welcome letters from the Executive Director, Chief Service Officer and Director of City Services
- Communication improvements:
 - Clarity in city correspondence
 - City ebulletins are concise and clear
 - Proactive notice of services available to cities
 - News of current events
 - Website enhancements

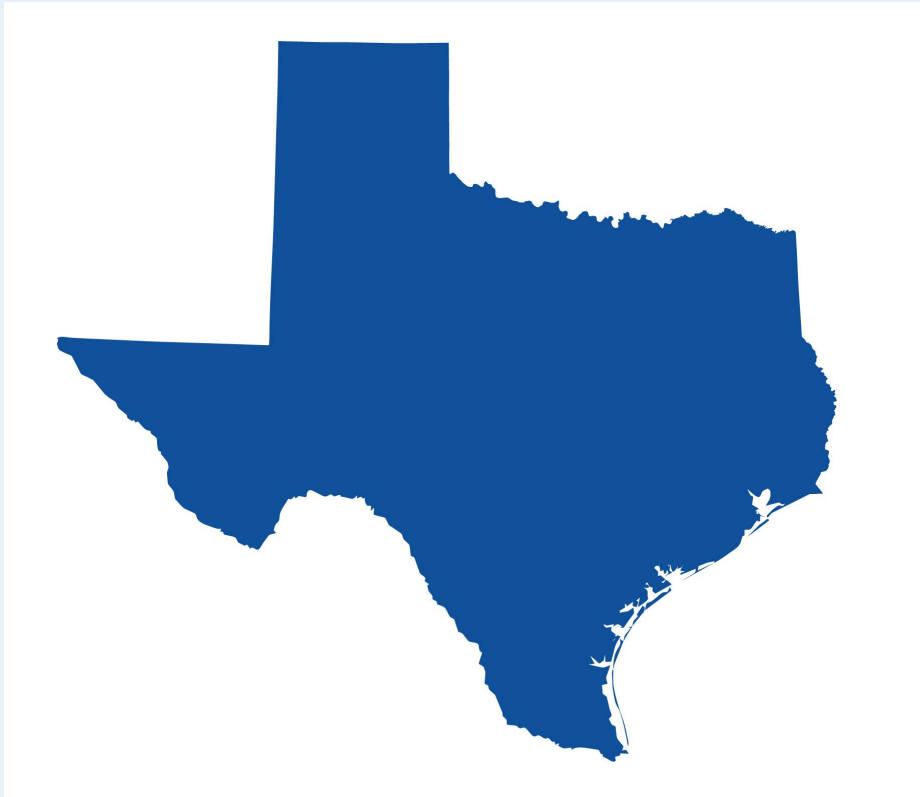
Services for TMRS Participating Cities

- City Portal
 - City Contribution Reporting
 - City Employer Reports
 - Member Retirement Estimates
 - Member Enrollment
 - Census data and SOC-1 Audit
- Executive Workshops
- Contribution System Training
- Resources for Plan Administrators
- New City Onboarding
- Plan Changes, Cost Analysis and Education
- City Dashboard

Meet Your City Services Team



City Services Administration Team



Colin Davidson
City Services Manager
cdavidson@tmrs.com



Veronica Escobedo
City Services Support Analyst
vescobedo@tmrs.com

City Services Assists with Plan Administration

- Provide ongoing educational resources for city correspondents and city administration.
- When a participating city wants to modify its plan, actuarial studies are provided and explained by City Services' staff.

City Services' Contributions Team



Jennifer Andrews
(Manager)



Anna Silva
(Team Lead)



Rhonda Green



Ida Gomez



Amanda Martinez



Rachel Mota

City Services' Contributions Team

- Processed \$1.6 billion in Member and city contributions in 2020 from 895 cities.
- Enrolled 18,132 new Members in 2020.
- Reduced payroll processing times by 60%.
- Promoted the use of TMRS' City Portal. Enrollments via the City Portal grew to 6,123 in 2020, an 18% increase from 2019.

Modernization of TMRS City Portal

- Member Center
- Upload Documents
- Enrollment
- Reports
- City Contributions
- Manage Users
- Member Center

Thank You

