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OMHRA Session Tackles Pension Administration Issues

OMERS teamed with the Ontario Municipal Human Resources Association (OMHRA) to offer an informative session to OMHRA members that covered many topical issues affecting pension plan administration.

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At Your Service…

OMERS has refined its service delivery model to better serve employers and members and to be prepared for future growth. Find out more about the changes we've made to enhance and streamline our service to more than 900 employer groups across Ontario.

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New Rates Announced for OMERS Supplemental Plan

New contribution rates have been established for the OMERS Supplemental Plan for Police, Firefighters and Paramedics. The new rates are effective from January 1, 2011, and were announced by the OMERS Sponsors Corporation (SC) in August 2011.

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Employer Newsletter

OMHRA Session Tackles Pension Administration Issues

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Peggy Mellor and Christine Ball, OMHRA

OMERS teamed with the Ontario Municipal Human Resources Association (OMHRA) to offer an informative session to OMHRA members that covered many topical issues affecting pension plan administration.

Michael Robinson, Manager of Education and Training at OMERS, was one of the presenters who covered a variety of topics, including enrolments and buy-backs, bona fide retirement, phased retirement and AVCs.

“Probably the most popular topics were enrolment and bona fide retirement and termination,” Michael says. “There was a big crowd with lots of enthusiasm and they asked great questions.”

The discussion about enrolment touched on several points, including the differences between continuous full-time (CFT) and other-than-continuous full-time (OTCFT) employees, and employer responsibilities regarding omission periods. Case studies helped to illustrate the concepts.

Over 100 OMHRA members from across the province gathered at the Westin Bristol Hotel in Toronto; other members participated via videoconference.

OMHRA received positive feedback from attendees. “They appreciated that speakers worked together and discussed issues from their own perspectives,” says Peggy Mellor, President of OMHRA. “The case studies presented were very relevant for the group.”

OMHRA represents over 300 members in almost 200 organizations, including municipalities, local public sector boards and commissions. “OMHRA provides a medium for communication and exchange of information, knowledge and ethical standards for those in the field of public sector human resources management,” says Christine Ball, Executive Officer of OMHRA. She has been involved with the association for nearly 20 years.

“For the length of time I’ve been with OMHRA, we have always had a good working relationship with OMERS,” says Christine. “A representative from OMHRA has always attended OMERS public meetings, and there is an annual meeting with the OMHRA Board and OMERS senior staff, where we discuss current issues and challenges, as well as any upcoming changes to the pension plan.”

Peggy notes that part of OMHRA’s mandate is to develop partnerships and provide information on current issues and changes in legislation to members. “Our relationship with OMERS supports this mandate and benefits our membership as a whole,” she says.

In This Issue

There are a couple of reasons OMERS employers should attend events like this one, says Peggy. "The first reason is to keep up to date and be aware of all the nuances within the OMERS pension plans. The second is to network and hear what other municipal employers are doing."

For more information, visit OMHRA's website or call Christine Ball at 905-631-7171.

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Employer Newsletter

At Your Service...

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OMERS has refined its service delivery model to better serve employers and members and to be prepared for future growth. What follows are the principal changes we've made to enhance and streamline our service to more than 900 employer groups across Ontario.

Client Services

- Our staff has grown in number and in their capacity to help you with your OMERS administration needs. Whenever you have OMERS administration issues and questions – including anything related to the e-Form 119 annual reconciliation process – Client Services is your first point of contact.
- Your call will be answered by a knowledgeable and customer-focused representative who has instant access to OMERS systems and information.

Pension Communications and Education and Training

- Our Education and Training Specialists will contact you to support your education and training needs, including the Employer Administration Workshop, e-Form 119 training in the fall, and ongoing member information sessions across the province.
- We are enhancing our *Employer Administration Manual*. This manual is the OMERS administration reference tool, containing everything you need to know to administer the OMERS pension plans – from a member's enrolment through to retirement. It is continually updated and you can access it online 24/7.
- You will continue to receive timely news and information on OMERS via the electronic *Employer News*.

Pension Operations

- OMERS now has two service teams dedicated to delivering the full spectrum of pension services to our employers and members.
- A third team will focus on analysis and quality assurance.
- You will continue to enjoy industry-leading response on pension benefits, and we will communicate with you as needed on specific files using e-correspondence on our secure e-access channel.

The last word...

We remain committed to providing leading service to all of our employer representatives. Please feel free to contact OMERS Client Services on any OMERS issues.

OMERS Client Services – one call does it all

The recent expansion and strengthening of OMERS Client Services helps us to serve you better. In 2010, Client Services answered 11,489 employer calls. "Since then, we have added more staff, enhanced their training and expanded their capabilities to assist our employer groups," says Carm Hyde, Director, Client Services.

Full-range service

"Client Services Representatives are now your first point of contact for all your OMERS administration needs, including questions relating to e-access, enrolments, buy-backs, leaves, disabilities and e-Form 119," adds Carm. "When you phone, your call will be directed to our experienced representatives."

You can reach us several ways

Phone: 416-369-2444 or 1-800-387-0813, Monday to Friday (8 a.m. to 5 p.m.)
E-access: our online OMERS administration tool, which includes our secure e-Correspondence communication utility (contact us if you don't already have an account)
Email: employer@omers.com (for general inquires only)
Web: www.omers.com (home of the up-to-date OMERS *Employer Administration Manual*)

Employer Newsletter

OMERS 2012 Contribution Rates and Plan Changes

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As we previously informed you, OMERS Sponsors Corporation (SC) has approved changes to the OMERS Primary Pension Plan (OMERS Plan) and Retirement Compensation Arrangement (RCA).

- Contribution rate increases were set for 2012, the second increase as part of a three-year strategy announced in 2010.
- The funding flexibility of the RCA was enhanced.

The OMERS Plan text must be amended for the changes to come into effect.

The SC also made the decision to file the December 31, 2010, Primary Plan actuarial valuation.

The OMERS SC is responsible for plan design and contribution rate decisions. The SC Board includes 14 members that represent both members and employers contributing to the Plan.

Contribution rates

Contributions to the OMERS Plan are made by members and matched by employers. Along with investment earnings, contributions provide members with lifetime retirement income. Contribution rate changes are effective with the first full pay in 2012. The changes will mean an estimated increase of 10% to 13%, on average, to an employer's annual OMERS pension budget.

Contribution rates		2011	2012
Normal retirement age 65 members	On earnings up to CPP earnings limit*	7.4%	8.3%
	On earnings over CPP earnings limit*	10.7%	12.8%
Normal retirement age 60 members	On earnings up to CPP earnings limit*	8.9%	9.4%
	On earnings over CPP earnings limit*	14.1%	13.9%

** CPP earnings limit (Year's Maximum Pensionable Earnings or YMPE) in 2011 is $48,300; the limit in 2012 will be higher. OMERS members pay a lower rate of contributions on earnings up to the YMPE because OMERS and the CPP are designed to work together to provide pension benefits. Pension plan contributions are tax deductible which will lessen the net impact on Plan members.*

In 2010, OMERS SC announced a three-year contribution rate increase for the OMERS Plan, totalling 2.9% per side (members and employers).

- A flat 1% contribution rate increase per side was implemented in 2011.
- Rate increases for 2012 were allocated following a review of a contribution rate study and other information provided by the OMERS actuary. The new rates affect members differently at various earnings levels and normal retirement age groups (65 and 60) and are set based on careful consideration of rates and benefits within the total OMERS membership. These rates will provide the OMERS Plan with the total contributions required in accordance with the SC decision.
- The SC will set contribution rates for 2013, following further review. These rates will average 0.9% per side. The SC will continue to review the principles for allocating and determining contribution rates for all members.

Examples of biweekly contribution increases, based on 26 pay periods:

Normal retirement age 65

Total annual earnings example	2011 contributions	2012 contributions	Difference per pay (gross)	Difference per pay (net)
$25,000	$71.16	$79.81	$8.65	$6.40
$50,000	$144.47	$162.56	$18.09	$12.46

Normal retirement age 60

Total annual earnings example	2011 contributions	2012 contributions	Difference per pay (gross)	Difference per pay (net)
$50,000	$174.55	$183.71	$9.16	$6.31
$75,000	$310.13	$317.36	$7.23	$4.98

* *Employers pay a matching amount.*

These rate increases are intended to be temporary and are part of a long-term strategy to return the Plan to full funding. When the Plan reaches full funding and the deficit is eliminated, rates will be adjusted.

These changes do not affect OMERS retired members, deferred members or survivors.

Retirement Compensation Arrangement (RCA)

The RCA is a separate fund that pays benefits over and above the maximum pension that the OMERS Plan is permitted to pay according to the *Income Tax Act*. In 2011, the maximum pension is $2,552.22 per year of credited service, which is reached at contributory earnings of $143,163.00.

The SC approved a change that requires an annual review of the RCA to ensure that it maintains a viable funding level. Effective January 1, 2012, the earnings level at which contributions are directed to the RCA will vary each year (within a certain range), based on the actuary's projections, to maintain this viable funding level. We will communicate this earnings level to employers every year as part of our year-end checklist.

Plan valuation

Registered pension plans must file an actuarial valuation showing the Plan's financial position at least once every three years. The decision was made to file the December 31, 2010 OMERS Plan valuation with the regulators. The next required filing will be the December 31, 2013 valuation.

OMERS is one of the top pension plans in Canada, and like many other major public sector plans, is on course to address funding challenges. OMERS is well-positioned to meet its pension obligations.

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Employer Newsletter

New Streamlined Process for Buying Service

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Starting September 26, 2011, OMERS members will find it easier to request a cost to buy service in the OMERS Plan. In turn, the new process makes it easier for employers by reducing the number of forms they must complete.

Eligible members now have two ways to obtain a cost to buy service:

- They can use the improved Buy-back Calculator on the myOMERS secure member site.
- They can phone OMERS Client Services.

The new process does not alter the rules for buying service (the types of purchasable service are the same); however, it will allow members to determine the cost sooner and decide if they wish to make a purchase. Only if a member decides to proceed, OMERS will request appropriate proof of the service (if required).

What's changed?

Previously, **before** a cost would be calculated:

- the member and the member's current employer were required to complete a Form 160 – Service purchase application form (OMERS or public sector employer) or a Form 260 – Service purchase application form (private sector employer); and
- for non-OMERS service, the member's former employer or pension plan would also have to complete part of Form 160 or Form 260.

However, not all members purchase service, so the process has been made more efficient. OMERS employers will be involved with a buy-back only if the member decides to go ahead with the purchase, and then, only if salary information needs to be confirmed.

You will notice the following changes to forms:

- *E-Form/Form 102 – Enrolling a member* has had minor additions. If an employee has a difference between their hire date and enrolment date, OMERS will request the member's annual salary and percentage worked during that period. This will allow OMERS to automatically provide a buy-back cost to the member. The member's address information will also be required so OMERS can correspond with the member directly. (The paper Form 102 will be updated by the end of October 2011.)
- Form 160 and Form 260 have been deleted from the website because they are no longer required when a member is purchasing service.
- To date, Form 160 has also been used for optional service. This function of the form will be maintained on a new form that will be announced in a future e-alert. If you need to report optional service in the meantime, please contact Client Services.

Full details about the changes are available online.

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Employer Newsletter

Admin Manual Helps With…Enrolment Questions

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OMERS online *Employer Administration Manual* covers all aspects of the administration of the OMERS pension plans: OMERS Primary Pension Plan; OMERS Supplemental Plan for Police, Firefighters and Paramedics; and OMERS Retirement Compensation Arrangement.

This resource is available anytime on www.omers.com, and it is a great reference tool for both new and veteran OMERS administrators.

Here, we focus on the sections of the Manual that help with one of the most challenging OMERS administration issues: **the enrolment of employees**.

There's only one simple rule for full-time employees (continuous full-time [CFT]): they should be enrolled in the OMERS Plan on their date of hire. The rules get more complicated when employees work part-time (other-than-continuous full-time [OTCFT]). If you have an OMERS participation by-law or resolution that requires OTCFT employees to join OMERS, then they must be enrolled immediately on their date of hire. If there's no mandatory participation rule, they must meet the eligibility criteria described in the Pension Benefits Act (PBA) of Ontario before they have the option to join the Plan.

So, by now, you might have questions: What is the OMERS definition of a CFT versus an OTCFT employee? What are the eligibility criteria set out in the PBA?

Thankfully, for both the uninitiated and the seasoned veteran looking for a refresher, the *Employer Administration Manual* has the answers.

In Section 2, Enrolling a member…

You will find the OMERS definition of a continuous full-time employee, along with details about which employees must and must not be enrolled.

We also cover special cases, such as new employees who are:

- already OMERS members through employment with another OMERS employer
- transferring in from another registered pension plan
- OMERS retirees who are returning to work.

There are instructions explaining the entire enrolment procedure – from filling out the *e-Form/Form 102 – Enrolling a member*, through to offering the new member a "welcome package," which includes a copy of the OMERS member handbook, *Your OMERS Pension*.

In Section 6, Other-than-continuous full-time members…

In This Issue

You will find the OMERS definition of an OTCFT (part-time) employee, along with explanations of both mandatory and voluntary enrolment for these employees.

The section also provides details about:

- the process for offering part-time employees membership every year they are eligible to join OMERS; and
- the need to keep appropriate records of any employees who waive the option to join.

Membership rules for council members are covered separately, in Section 7 of the Manual.

“Manual” labour pays off…

The OMERS Employer Administration Manual is frequently updated with the latest information, usually at the end of each calendar quarter. Use it whenever you need answers to your administration questions.

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Employer Newsletter

OMERS Private Equity Invests in Husky International

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You may not realize it, but the food container holding your lunch may be the product of OMERS Private Equity's latest investment, Husky International.

In fact, most of the food containers, caps and closures and bottles for beverages, personal care and household products used in the world today are produced on equipment made by Husky.

On June 30, OMERS Private Equity, together with Boston-based private equity firm Berkshire Partners, closed a deal to purchase Husky from Toronto's Onex Corporation.

Based in Bolton, Ontario, Husky was founded as a small machine shop in a Toronto garage in 1953. The company soon found its niche in specialized mould-making for the plastics industry. From its humble roots, Husky developed into the leading producer of innovative, high-speed injection moulding systems for thinwall containers – the packaging of choice for many products, including a wide variety of food items.

"Husky is a true Canadian success story and a valuable addition to the OMERS Private Equity portfolio," says Managing Director Lisa Melchior.

Husky is the leading global supplier of injection moulding equipment and services to the plastics industry. The company has more than 40 service and sales offices supporting customers in over 100 countries, and manufacturing facilities in Canada, the United States, Luxembourg and China.

Not only is Husky a good financial investment, it is also an investment in the environment. You may not realize it, but the environmental footprint of plastic packaging is approximately 30% better than glass and metal, due to lower energy consumption and greenhouse-gas emissions in production and transportation.

Husky's equipment is used to manufacture a wide range of plastic products. The demand for these products is growing rapidly in the emerging market as a result of a rising middle class and urbanization trends.

"There are many more opportunities for growth still to come," Lisa says.

Employer Newsletter

AVC Update and Auto-Contributions

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OMERS Additional Voluntary Contributions (AVCs) continue to grow. The number of participants has reached nearly 5,000, with a total of $90 million in automatic contributions and fund transfers combined.

Members with an AVC account can use their myOMERS account to monitor and manage their AVCs. (Members who don't yet have an AVC account can set one up using myOMERS.)

Auto-contributions

Any time during the year, active members (including our OMERS employers) also have the option to set up pre-authorized debit payments into their AVC account every two weeks (minimum of $20) or monthly (minimum of $40). There are two ways to do this:

1. Complete and submit Form 401 – AVC automatic contribution plan [429 KB].
2. Complete the auto-contributions request section in myOMERS.

myOMERS is the secure, online pension portal for members. myOMERS participants can monitor their AVC accounts, set up and modify their automatic contributions, or start the process to transfer funds (during the transfer window of January 1 to April 30, 2012).

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Employer Newsletter

OMERS "Green-Lights" More E-options

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OMERS is continuing to offer more electronic-delivery options to our employers and members. The switch from paper to "e" saves time, money and helps to protect the environment.

Our employer newsletter, *Employer News*, is now fully electronic; we no longer print copies. Instead, once an issue is ready for distribution, we send an email alert that includes brief article abstracts with links to the full stories online. The delivery is immediate.

We are moving toward the same goal for our *Member News* newsletter. Currently, we are pilot-testing an electronic version, which we send to about 1,000 myOMERS participants.

In the meantime, active members (and retirees) who sign up for myOMERS may choose to receive their annual statement as an e-version only. This gives them direct access to their information – saving you the time and effort of distributing these materials to active members, which can be compounded if you have satellite locations.

Help us to help you

Encourage your members who haven't already done so to sign up for a myOMERS account. In addition to e-delivery of their annual statement, participants can also view their OMERS information online, as well as access our service-purchase and retirement-income estimators.

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Member Newsletter

New Rates Announced for OMERS Supplemental Plan

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New contribution rates for the OMERS Supplemental Plan for Police, Firefighters and Paramedics were announced by the OMERS Sponsors Corporation in August 2011, and are effective from January 1, 2011.

The Supplemental Plan was established in 2008 under provincial legislation. Supplemental benefits can "top up" the pension a member earns in the OMERS Primary Pension Plan. Benefits are not automatic; they can be offered by an employer, typically as the result of the collective bargaining process.

Supplemental Plan contribution rates are set assuming a minimum of 5,000 participating members. As of August 2011, there were no members in the Supplemental Plan. Read more in the fact sheet about the Supplemental Plan including contribution rates. [199 KB]

In This Issue