

NB 360-17-34 PER – Midcareer and Preretirement Pilot Courses For Civil Service Retirement System and Federal Employees Retirement System

National Bulletin: 360-17-34 **Date:** September 14, 2017
Subject: PER – Midcareer and Preretirement Pilot Courses For Civil Service Retirement System and Federal Employees Retirement System

Action Required By: November 1, 2017

Purpose. To announce midcareer and preretirement pilot courses and the session and seminar event request process.

Expiration Date. September 30, 2018

Background. The Thrift Savings Plan Open Elections Act of 2004 (Public Law 108-469) required the U.S. Office of Personnel Management (OPM) to develop and implement a retirement financial literacy and education strategy for Federal employees as part of the retirement training offered by OPM under 5 U.S.C. Section 8350. Per OPM, the implementation of the strategy must educate Federal employees on the need for retirement savings and investment, provide information on how to plan for retirement, and teach how to calculate the retirement investment needed to meet their retirement goals. The strategy is available at www.opm.gov/retire/pre/botdg/training/index.asp.

Explanation. In support of this strategy, NRCS launched a retirement training pilot for midcareer and preretirement NRCS employees in August 2017. The program focuses on educating employees on the need for retirement savings and investment, provides information on how to plan for retirement, and teaches how to calculate the retirement investments needed to meet their retirement goals. The training is for midcareer employees (5-20 years of civil service) and preretirement employees in both the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS) retirement systems. Preretirement classes are for those who are within 10 years of retirement eligibility. See attachment for detailed course descriptions.

- To request these retirement courses (as with other requests for State-specific or State-sponsored sessions), State or local training officers need to submit a request to the National Employee Development Center (NEDC) organizational box (NRCS.AgLearn@ftw.usda.gov) to the attention of Lisa Visokey. There are limited funds available and sessions and seminar events will be scheduled on a first-come, first-served basis.
- Include the following information in the email request:
 - Specific retirement courses requested
 - Number of students per session
 - Location to conduct training (physical address)
 - Requested dates or date range (available dates run from January 2, 2018 to September 30, 2018)
 - Local point of contact (responsible for reserving the training room of sufficient size for registered employees and their spouses, receiving training materials, and maintaining list of attendees)
 - Vendor costs (including vendor instructor travel) will be paid by NEDC. NEDC will not pay participant travel expenses.
 - Once the local training officer receives approval from NEDC, the local training officer will create AgLearn seminar events using the following course IDs:
 - NRCS-NEDC-LOCAL-000004 for Midcareer Retirement Planning (FERS)
 - NRCS-NEDC-LOCAL-000005 for Preretirement Planning (CSRS)
 - NRCS-NEDC-LOCAL-000006 for Preretirement Planning (FERS)
 - Spouses of employees registered through AgLearn may attend for free, but must share training materials with the employee participant. (This will double the size of classroom space needed to be reserved for this training.)
 - The minimum class size is 15 (federal employee) participants.

Objective

Retirement training will focus on financial choices and retirement options available for civil service employees in preparation for retirement at the midcareer point (5-20 years of service) and preretirement (within 10 years of retirement eligibility).

Eligibility

Participants must meet the class requirement. Employees in the midcareer training must have between 5-20 years of Federal civil service and employees in the preretirement training must be within 10 years of retirement eligibility.

Funding

NEDC will fund tuition and contractor travel expenses only. Participant travel, lodging, and per diem expenses will **not** be funded by NEDC. Participants' home units will fund salary and benefits. This training is intended to be at or near the duty location. However, if applicable, the requesting office must pay for all costs associated with travel, lodging, and per diem.

Contact. If you have questions regarding these retirement courses, please contact Stacy Rice, NEDC instructional systems specialist, at Stacy.Rice1@ftw.usda.gov.

/s/

THOMAS W. CHRISTENSEN
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- Attachment A – Graduate School USA Retirement Course Descriptions
- Attachment B – Ann Fagelson CSRS 2 Day Retirement Agenda
- Attachment C – Ann Fagelson FERS 2 Day Retirement Agenda
- Attachment D – Ann Fagelson FERS 3 Day Retirement Agenda