



CUSTOMER SERVICE WORKSHOP

InterContinental Buckhead Atlanta, Atlanta, GA | June 6-8, 2022 | AGENDA

MONDAY, JUNE 6

6:30 p.m. (ET)

Welcome Reception and Dinner (*Hope Terrace*)

TUESDAY, JUNE 7 (WORKSHOP SESSIONS HELD IN PARK LANE)

8:00 a.m. (ET)

Group Breakfast (*Hope 1 & 2*)

8:50 – 9:00 a.m.

Welcome from the National Council on Teacher Retirement

- *Dean Kenderdine, Executive Director, NCTR*
- *Robyn Wheeler, Assistant Executive Director, NCTR*

9:00 – 10:45 a.m.

Introductions and General Roundtable Discussion

10:45 – 11:00 a.m.

Break

11:00 – Noon

Group Discussion: Staffing – Recruitment and Retention

How does your system recruit employees and retain employees? A group discussion on is currently being done to remain competitive in today’s workplace market.

Noon

Lunch (*Hope 1*)

1:00 – 2:00 p.m.

Cyber Security and Your Members

Online tools have been implemented at a high rate in the past few years in an effort to assist members. As such, so have fraudulent attempts to gain access to member accounts. Join us as we hear from Executive Director, Jim Potvin, of Georgia ERS, on how their system has identified this threat and methods they have used to head off such risks to member accounts.

- *Jim Potvin, Executive Director, Georgia ERS*

2:00 – 3:00 p.m.

System Websites – When to Refresh

Websites remain a valuable tool of communicating with all stakeholder groups. How often should you refresh your site? Whether handled internally or through a vendor, what are best practices when thinking about a refresh?

3:00 – 3:15 p.m.

Break

3:15 – 4:15 p.m.

Leveraging Social Media and Content for Member Engagement

Join us to hear Georgia TRS Outreach and Communications team share what they have done in the area of leveraging social media and content creation for member engagement.

- *Winston Buckley, Director of Communications & Outreach, Georgia TRS*



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TUESDAY, JUNE 7 (continued)

4:15 – 4:30 p.m.	Wrap Up for the Day
6:00 p.m.	Group Dinner (Hope 1 & 2)

WEDNESDAY, JUNE 8 (WORKSHOP SESSIONS HELD IN PARK LANE)

8:00 a.m. (ET)	Group Breakfast (Hope 1 & 2)
9:00 – 10:00 a.m.	<p>Member Education – Midcareer <i>Learn what systems are doing to provide education and resources to midcareer members.</i></p> <ul style="list-style-type: none"> Gina Eversley, Program Development, Quality & Training Manger, Retirement Readiness, CalSTRS
10:00 – 11:00 a.m.	<p>Communicating the COLA <i>During the last two years, many pension funds recognized an increase on their investment returns. Recently, the Federal government has increased interest rates and the cost of living has gone up substantially. Whether set by statute or determined by the Board, how best do you communicate to your members about COLAs during the unique times?</i></p>
11:00 – 11:15 a.m.	Break
11:15 – 12:15 p.m.	<p>Federal Relations Update <i>Hear from Leigh Snell, NCTR’s Washington DC lobbyist, on issues impacting the pension industry and discuss the impact of ASOP 4 and communication with your membership and stakeholders.</i></p> <ul style="list-style-type: none"> Leigh Snell, Federal Relations Director, NCTR
12:30 – 1:30 p.m.	Lunch (Hope 1)
1:30 – 2:30 p.m.	<p>National Institute on Retirement Security (NIRS) <i>An update on the national research and anticipated reports on pension related issues as presented by NIRS.</i></p> <ul style="list-style-type: none"> Dan Doonan, Executive Director, NIRS
2:45 – 3:45 p.m.	Round Robin – What’s on your mind?
3:45 – 4:00 p.m.	Wrap Up for the Day; Dinner on your own