



THE NATIONAL COUNCIL ON TEACHER RETIREMENT *PRESENTS*
2023 CUSTOMER SERVICE WORKSHOP

VIRTUAL | December 13 & 14 | AGENDA

WEDNESDAY, DECEMBER 13 *(Times noted in ET)*

11:00 – 11:15 am (ET)

Welcome from the National Council on Teacher Retirement

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

11:15 am – 12:30 pm.

Introductions & General Roundtable Discussion

Theme: *Challenges in Meeting Customer Service Staffing Demands*

Discussion Leader: Erika Glaster, Executive Director, Massachusetts TRS

12:30 – 12:45 pm

Break

12:45 – 1:45 pm

Cyber Security Third-Party Vendors

Your system's current cybersecurity practices may be best practice, but how sure are you of those followed by your third-party service providers and vendors?

- Dave Maradiaga, Bureau Director & CISO, Wisconsin ETF
- Amy Timmons, Sr. Vice President & Sr. Consultant, Segal

1:45 – 2:00 pm

Break

2:00 – 3:00 pm

A.I. & Customer Service

Artificial Intelligence is the hot topic in just about every industry today. What about the customer service units of public pension plans? How are systems addressing this challenging and promising technology?

- Winston Buckley, Director, Communications & Outreach, Georgia TRS
- Nate Haws, Associate Principal Consultant & A.I. Researcher, Linea Solutions

3:00 – 3:15 pm

Break

3:15 – 4:00 pm

Member Engagement & Outreach – *How have Past Practices Changed? What Remains the Tried and True?*

How is your system currently reaching out and ensuring optimal communications with your stakeholders? What are your new best practices today?

- Michelle Holleman, Director of Communications, Chicago Teachers' Pension Fund

4:00 pm

Wrap Up of Day 1



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THURSDAY, DECEMBER 14 *(Times noted in ET)*

11:00 am – Noon (ET)

Diversity, Equity & Inclusion (DEI)

Does your system have a policy or a dedicated staff to oversee DE&I? What tools do you use to measure how your system is ensuring they are balancing both new hires and professional growth, as it relates to DE&I?

- Danny Malavé, Managing Director of Diversity, Equity & Inclusion, New York State Teachers' Retirement System
- Kellie Sauls, Director, Outreach, Culture & Engagement, Texas TRS

Noon – 1:00 pm

Return to Work (Again!)

The latest changes and challenges in your state.

1:00 – 1:15 pm

Break

1:15 – 2:15 pm

National Institute on Retirement Security – Latest Research

Hear from the leadership of the National Institute on Retirement Security on their latest research and state of retirement.

- Dan Doonan, Executive Director, NIRS

2:15 – 2:30 pm

Break

2:30 – 3:30 pm

Federal Relations Update

An update on current issues impacting the public pension fund industry.

- Leigh Snell, Federal Relations Director, NCTR

3:30 pm

Wrap Up of Day 2 & Open Discussion

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