"Post" Script: What's Next for Employment-Based Health Benefits

EBRI-ERF Policy Forum #71

Barbara Jordan Conference Center
Henry J. Kaiser Family Foundation
1330 G Street NW
Washington, DC 20005

Thursday, December 13, 2012
9:00 a.m. – 12:30 p.m.

Speakers & Discussants

Nevin E. Adams

Nevin E. Adams is director of Education and External Relations at the nonpartisan Employee Benefit Research Institute, and co-director of EBRI's Center for Research on Retirement Income, as well as Director, American Savings Education Council.

Prior to that he spent a dozen years as Global Editor-in-Chief of ***PLANSPONSOR*** magazine, its Web counterpart, ***PLANSPONSOR.com***, as well as PLANADVISER and PLANSPONSOR Europe magazines, the latter launched in 2009. He was also the creator, writer and publisher of PLANSPONSOR.com's ***NewsDash***, the industry's leading daily source for information focused on the critical issues impacting benefits industry professionals, and was instrumental in launching the publication's popular and distinctive conference series.

He began working with retirement plans as a college intern in 1977, and went on to spend the next nine years at Northern Trust in Chicago, Illinois in a variety of management roles, culminating in the development of a proprietary recordkeeping platform. In 1986 he joined Wachovia Bank to lead their defined contribution/recordkeeping businesses. During his tenure there, he was responsible for implementing the firm's first voice response system and daily valuation capabilities, as well as their participant education curriculum. He also led key initiatives in product development, trust accounting, and recordkeeping and trust system conversions.

A frequent and popular speaker at industry and trade conferences, he graduated summa cum laude with a BS in Finance from DePaul University in Chicago, Illinois. In 1988 he received his JD, also from DePaul University.

He has twice been awarded (2002 and 2004) NAGDCA's (National Association of Government Defined Contribution Administrators) Media Recognition Award for outstanding coverage of pension and retirement issues, and was been named one of the 401(k) Industry's 100 Most Influential by readers of the 401(k) Wire for five years in a row.

Peter Baxter

Peter Baxter is Senior Vice President of Insurance & Financial Services at the National Rural Electric Cooperative Association (NRECA) where he has overall responsibility for the multiple-employer DB, DC and H&W programs offered to member cooperatives representing over $11 Billion in qualified plan assets. Peter has over thirty years of experience in the employee benefits, group insurance and financial services industries. Prior to joining NRECA he held a variety of leadership positions in not-for-profit, privately-held and public firms, including Mutual of America Life Insurance Company, Financial Institutions Retirement Fund, American Century Investments and EDS. He has also worked for leading employee benefit consulting firms Buck Consultants and Towers Perrin. At these firms, Peter’s responsibilities included executive leadership, market strategy, product design and development, administrative operations, vendor management and service delivery. He also has extensive experience in the use of technology and industry best practices to enhance business processes, customer service and program administration. Peter is a graduate of the University of Arizona in Tucson, AZ. He is a member of the Board of Trustees of the Employee Benefit Research Institute (EBRI) and the Policy Advisory Board of the American Benefits Council (ABC) in Washington, DC.

Mike Callender

Mike joined FedEx in December 2005 and is the Staff Director of Internal Controls and Benefits Accounting for FedEx Corporation. Mike’s responsibilities include overseeing FedEx’s annual SOX 404 assessment which also includes maintaining compliance controls and systems. He is also responsible for the financial compliance and reporting of FedEx’s self-insured health and welfare plans.

Paul Fronstin

Paul Fronstin is a senior research associate with the Employee Benefit Research Institute, a private, nonprofit, nonpartisan organization committed to original public policy research and education on economic security and employee benefits. He is also Director of the Institute's Health Research and Education Program, and oversees the Center for Research on Health Benefits Innovation. He has been with EBRI since 1993.

Dr. Fronstin's research interests include trends in employment-based health benefits, consumer-driven health benefits, the uninsured, retiree health benefits, employee benefits and taxation, and public opinion about health benefits and health care. In 2012, Dr. Fronstin was appointed to the Maryland Health Care Commission. He currently serves on the steering committee for the Emeriti Retirement Health Program. He is also the associate editor of Benefits Quarterly. In 2010, he served on the Institute of Medicine (IOM) Committee on Determination of Essential Health Benefits In 2002, he served on the Maryland State Planning Grant Health Care Coverage Workgroup. In 2001, Dr. Fronstin served on the Institute of Medicine Subcommittee on the Status of the Uninsured.

Dr. Fronstin earned his Bachelor of Science degree from SUNY Binghamton and his Ph.D. in economics from the University of Miami. Dr. Fronstin can be reached at fronstin@ebri.org.

Randy H. Hardock

Randy Hardock is a partner in the tax and legislative law firm of Davis & Harman LLP. Mr. Hardock concentrates on tax and ERISA issues relating to retirement, health, and other employee benefit plans. Before joining Davis & Harman, Mr. Hardock served as Benefits Tax Counsel at the United States Department of the Treasury and as Tax Counsel to the United States Senate Committee on Finance. Mr. Hardock earned his J.D., magna cum laude, from the University of Pennsylvania Law School where he was an editor of the University of Pennsylvania Law Review and was elected to the Order of the Coif. He received his B.A., magna cum laude, from the University of Rochester.

G. William Hoagland

G. William Hoagland is a senior vice president at the Bipartisan Policy Center (BPC). Hoagland has completed 33 years of federal government service, 25 spent as staff in the U.S. Senate. In 2007 CIGNA Corporation appointed him as vice president of public policy to work with CIGNA business leaders, trade associations, business coalitions, and interest groups to develop CIGNA policy particularly on health care reform issues at both the federal and state levels.

Hoagland is an affiliate professor of public policy at the George Mason University and a board member of the Committee for a Responsible Federal Budget; National Campaign's Public Policy Advisory Group focusing on teen pregnancy and unwanted pregnancy; the National Academy of Social Insurance; and the National Advisory Committee to the Workplace Flexibility 2010 Commission. In 2009 he was appointed to the Peterson-Pew Commission on Budget Reform examining the overall structure of the budget, authorization, and appropriations process and was a member of BPC's Debt Reduction Task Force that published Restoring America's Future in November 2010.

Born in Covington, Indiana, he attended the U.S. Maritime Academy and holds degrees from Purdue University (B.S.) and the Pennsylvania State University (M.S.). His family's Indiana family farm was awarded by that state as a "Hoosier Homestead" for having remained in the family for over a century.

Frank B. McArdle, Ph.D.

Frank McArdle is an independent consultant who previously managed the Washington, D.C. Research Office of Aon Hewitt. Formerly the Director of Education and Communications at EBRI, Frank was also a professional staff member at the U.S. Senate, and served as a Special Assistant to the Commissioner of Social Security. He is a member of the National Academy of Social Insurance and served for two terms on the CMS Advisory Panel on Medicare Education. Frank has a Ph.D. from the University of Virginia, and received his B.A. *Summa cum Laude* from Fordham University. He was a Woodrow Wilson Fellow and a Fulbright Scholar.

Dallas Salisbury

Dallas Salisbury, president and CEO of the Employee Benefit Research Institute (EBRI), joined EBRI as the chief staff executive at its founding in 1978. EBRI is a nonprofit, nonpartisan research organization that does not lobby and does not advocate or oppose any policy position. EBRI's mission is to provide objective information regarding the employee benefit system based on verifiable facts.

Salisbury serves on numerous advisory groups and boards, has written and lectured extensively on economic security issues, and is interviewed regularly by the news media. Prior to joining EBRI, Salisbury held full-time positions with the Washington State Legislature, the U.S. Department of Justice, the Employee Benefits Security Administration of the U.S. Department of Labor, and the Pension Benefit Guaranty Corporation (PBGC). He holds a B.A. degree in finance from the University of Washington and an M.P.A. from the

Maxwell School of Citizenship and Public Affairs at Syracuse University. Dallas grew up in Everett, WA, and now resides in Washington, D.C.

More detail is available at EBRI's Web site at www.ebri.org

Steven Wojcik

Steven Wojcik joined the National Business Group on Health in September 2000. He is vice president of Public Policy and is responsible for developing and coordinating the Business Group's position and strategy on federal legislative and regulatory issues impacting health benefits for large employers, providing information and analysis on best practices, conveying concerns of large employers as purchasers of health care to Capitol Hill and the Administration, and keeping members informed of policy developments in Washington. He has 25 years of experience in health policy development, analysis and research, government relations, and public affairs.