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Employee Benefit
Research Institute

Measured Matters

EBRI-ERF Policy Forum #75
Arnold & Porter LLP
555 Twelfth Street, NW Washington, DC 20004-1206
Thursday, December 12, 2013
9:00 a.m. – 12:30 p.m.

Speakers & Discussants

Nevin Adams

Nevin Adams is Chief of Communications for ASPPA, the American Society of Pension Professionals and Actuaries, overseeing all marketing and communications for the organization, as well as its sister organizations, the National Association of Plan Advisors (NAPA), the American College of Pension Actuaries (ACOPA), and the National Tax Sheltered Accounts Association (NTSA). He serves as Editor-in-Chief of NAPA Net and NAPA Net the Magazine, and as the Portal Conductor of the Industry Trends and Research station on NAPA Net.

Previously he was the Employee Benefits Research Institute's Director of Education and External Relations, Co-Director of EBRI's Center for Research on Retirement Income and Director of the American Savings Education Council.

Nevin spent a dozen years as Global Editor-in-Chief of PLANSPONSOR magazine and PLANSPONSOR.com, as well as the PLANADVISER Europe and PLANSPONSOR Europe magazines. He was the creator, writer and publisher of PLANSPONSOR.com's NewsDash, and was instrumental in launching the publication's popular and distinctive conference series. He also worked at Northern Trust in Chicago in a variety of management roles, culminating in the development of a proprietary recordkeeping platform, and at Wachovia Bank, leading their defined contribution/recordkeeping businesses.

He has been honored three times by the National Association of Government Defined Contribution Administrators (NAGDCA) with their Media Recognition Award (in 2002, 2004 and 2013), and was listed as one of the Most Influential People in Defined Contribution by the 401kWire for five consecutive years. He graduated summa cum laude with a BS in Finance from DePaul University in Chicago, Illinois. After a number of years working with retirement plans, he subsequently received his JD, also from DePaul University.

Alex Baldenko

Alex Baldenko has been working in the field of Mathematics and Probability for over 10 years focused on predictive modeling, machine learning, statistics and applied probability. He holds a Ph.D. in Applied Mathematics and Probability from the University of Connecticut. Alex is a Data Scientist at Aetna and has had an integral role in developing Aetna's member segmentation and personalization effort. In addition to contributing to the underlying strategy he worked with financial, business and actuarial teams to develop the methodology for identifying each segment. Prior to joining Aetna, Alex was an assistant professor of Mathematics at Trinity College in Connecticut and held several other academic roles supporting students and peers to better operationalize concepts using applied mathematics.

Jeff Carroll

Jeff Carroll is the Product Development Officer for DST Systems Applied Analytics Group. He is currently leading the development of new products to give retirement service providers valuable insights about their business through advanced analytics techniques and "Big Data" technologies. He has over 25 years of experience building and implementing technology solutions in the retirement business. Jeff was one of the original developers and architects of the TRAC, DST's retirement recordkeeping platform, and he has led many of the strategic product and service initiatives for DST Retirement Solutions over the years. Jeff earned an MBA from Rockhurst College in Missouri and a B.S.B.A. from Northern Arizona University.

Shari Davidson

Shari Davidson is vice president of the National Business Group on Health. The Business Group is a non-profit organization devoted exclusively to representing large employers' perspectives on national health policy issues and providing practical solutions to its members' most important health care problems. She is responsible for the Institute on Health Care Costs and Solutions (including the National Committee on Evidence-Based Benefit Design, the National Leadership Committee on Consumerism and Engagement, the Payment and Delivery Reform: Employer and Health Plans Committee and the National Committee on Pharmacy Benefits and Specialty Medicine) and the annual Business Health Agenda conference.

Previously Davidson was vice president of benefits at Visant Corporation (Visant). At Visant, she was responsible for the design, finance, communication and administration of health, welfare and wellness programs, retirement plans, Human Resources Information Systems and payroll. Visant was named a Best Employer for Healthy Lifestyles® seven years in a row and had medical trend well below the national average. Prior to joining Visant, Davidson worked for a large printing company, Quebecor World, for eight years in a similar capacity and spent eight years as a benefits consultant with Hewitt and William M. Mercer.

Before joining the staff, Davidson was an active member of the Business Group for 12 years, including being a founding member and co-chair of the Institute on Health Care Costs and Solutions, a founding member of the Institute on the Costs and Health Effects of Obesity, now the Institute on Innovation in Workforce Well-being, and a participant on the National Committee on Evidence-Based Benefit Design and the Public Policy Advisory Group. She served on the Client Advisory Boards for Anthem BlueCross BlueShield (as chair of the Clinical Strategy and Measurement Initiative Group), CVS Caremark, Castlight and Truven and on the Special Expertise Panel for Total Rewards/Compensation and Benefits for the Society for Human Resource Management (SHRM). Davidson received her B.S. in human development and family studies from Cornell University. She earned her certified employee benefit specialist (CEBS) designation from the Wharton School at the University of Pennsylvania.

Mark Englizian

Mark W. Englizian, CCP, GRP, is the Group Vice President of Total Rewards, HR Business Strategy & Solutions for Walgreen Co. headquartered in Deerfield Illinois. Walgreens is America's largest drugstore enterprise, and is intensifying the focus on customers with new businesses in e-commerce, healthcare services, on-site health system solutions and specialty pharmacy. Walgreens employs over 250,000 full and part-time workers in all 50 states, Guam, Puerto Rico and the US Virgin Islands. Walgreens is a Fortune 30 company with annual revenues exceeding $78bn. Through the international partnership with EU-based Alliance Boots, the combined company is the world's leading pharmacy-led health and beauty enterprise with over $100bn in revenue and 350,000 employees.

Mr. Englizian was formerly the Global Leader for Total Rewards with Amazon.com in Seattle, Washington, where he was directly responsible for total rewards strategy, policy and programs worldwide. Prior to his tenure at Amazon, Mr. Englizian was Director of Global Compensation at Microsoft Corporation, where he was responsible for a global team that managed executive, domestic and international compensation. Mr. Englizian has also held senior business and HR roles with Tektronix, Inc. and Red Lion/Doubletree Hotels.

Mr. Englizian is past Board Chair for *WorldatWork*, the premier professional association of compensation and benefits practitioners. Mr. Englizian is a member of the *National Association of Corporate Directors*, the *Conference Board Council on Executive Compensation* and is retained by Boards of Directors and Compensation Committees as counsel on executive compensation matters. He has been a guest lecturer for the University of Southern California Marshall School, Cornell University Graduate School and the National Foreign Trade Council. He is a reviewer for the *Harvard Business School Press*.

Mr. Englizian completed his undergraduate studies at Oregon State University, a graduate degree from Lewis and Clark College and has studied in the HR Executive Program at Cornell University. His community involvement has included Board leadership positions with United Way of King County, Childcare Resources and the Seattle Repertory Theatre.

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 board of trustees for Emeriti Retirement Health Solutions. He is the associate editor of Benefits Quarterly and is also a TIAA-CREF Institute Fellow. 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.

Christopher Goldsmith

Mr. Goldsmith is a Vice President and Client Relationship Manager at Sibson Consulting. He has 30 years of employee benefit plan and compensation consulting experience. He leads the firm’s behavioral economics initiative and is co-leader of the firm’s Healthy Enterprise initiative. He works with higher education institutions, private industry, public sector organizations and collectively bargained benefit plans.

Within the past two years Mr. Goldsmith has presented the subject of behavioral economics at various conferences sponsored by CUPA, NACUBO, the Council on Employee Benefits, WorldatWork, ASHHRA and the Academy of Behavioral Finance & Economics. His published works on the topic have appeared in *Sibson Perspectives*, *Benefits Quarterly*, *Workspan*, *Compensation Focus* and *HR Horizons*.

Mr. Goldsmith graduated from the University of Southern California with a BA in Psychology. He has earned several professional designations including Senior Professional in Human Resources (SPHR), Certified Compensation Professional (CCP) and Certified Employee Benefits Specialist (CEBS). He is past President of the Northeast Ohio Chapter of the International Society of Certified Employee Benefits Specialists.

Mike Manocchia

Mike Manocchia is presently Director and Senior Scientist leading Consumer Health Engagement Analytics at Cigna. He is also an adjunct professor at the University of North Florida, where he teaches health sociology. At Cigna, he directs a team conducting claims-related opportunity analyses, root cause survey and qualitative research and conducting health-related outcomes research studies. Mike has been conducting health services research for close to 25 years and has numerous publications and presentations in various forums. In the past, he has worked for BCBSFL and BCBS Rhode Island, Health Dialog and Ingenix (now Optum). Mike holds his PhD in medical sociology and research methods from Northeastern University in Boston.

Jim Moore

Dr. Moore is a managing director at PIMCO in the Newport Beach office. He is co-head of the investment solutions group and leads the global liability driven investments product management team. He is also PIMCO's pension strategist. Prior to joining PIMCO in 2003, he was in the corporate derivative and asset-liability strategy groups at Morgan Stanley and responsible for asset-liability, strategic risk management and capital structure advisory work for key clients in the Americas and Pacific Rim. Dr. Moore also taught courses in investments and employee benefit plan design and finance while at the Wharton School of the University of Pennsylvania, where he earned his Ph.D. with concentrations in finance, insurance and risk management. He has 20 years of investment experience and holds undergraduate degrees from Brown University.

Arthur Noonan

Arthur Noonan is a senior partner and actuary at Mercer in the Pittsburgh office. Mr. Noonan consults on a variety of non-traditional actuarial work for both pension and retiree medical benefits in such areas as plan design, funding, expense, forecasting and mergers and acquisitions.

With more than 30 years of experience in benefits consulting, Mr. Noonan specializes in the benefit programs of large industrial organizations. Representative client industries (private, public, and not for profit) with which he has worked include chemical, consumer, energy, health care and manufacturing.

A magna cum laude graduate with a BS degree in mathematics, Mr. Noonan graduated from the University of Pittsburgh. He is an Enrolled Actuary under ERISA, a Member of the American Academy of Actuaries and a Member of the Society of Actuaries.

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

Marilyn Serafini

Marilyn Werber Serafini is vice president for policy at the Alliance for Health Reform, and has been with the organization since 2012. She was a reporter in Washington, DC from 1985 until 2012, covering Congress, the White House and K Street for various publications. From 2010 to 2012, she was the Robin Toner Distinguished Fellow and a senior correspondent for Kaiser Health News. Her articles appeared in *The Washington Post, The New York Times, USAToday*, and other publications. From 1995 to 2010, she was the health care and welfare correspondent for *National Journal* magazine. She wrote extensively about Medicare, Medicaid, the uninsured, health care reform, bioterrorism and pandemic flu, and won a number of awards for articles on these subjects. Ms. Serafini covered the health reform debate during the Clinton Administration, and also the one that led to the Patient Protection and Affordable Care Act. She created and moderated *National Journal's* health care blog, and was a senior reporter for *CongressDaily* (now *National Journal Daily*) from 1991to1995. She received her undergraduate degree from UMBC, and a master's degree in journalism and public affairs from American University.

Jack VanDerhei

Jack VanDerhei is the research director of the Employee Benefit Research Institute (EBRI), a private, nonprofit, nonpartisan organization committed to original public policy research and education on economic security and employee benefits. He is also the director of both the EBRI Defined Contribution and Participant Behavior Research Program and the EBRI Retirement Security Research Program and the Director of the EBRI Center for Research on Retirement Income. He has been with EBRI since 1988.

Dr. VanDerhei has more than 200 publications devoted to employee benefits and insurance, but his major areas of research focus on the financial aspects of private defined benefit and defined contribution retirement plans. In 2008 he was named by *Treasury & Risk* as one of the 100 Most Influential People in Finance.

He is the editor of Benefits Quarterly and “Search for a National Retirement Income Policy” (University of Pennsylvania Press), a member of the National Academy of Social Insurance, a member of the Board of Outside Scholars for the University of Michigan Retirement Research Center, and on the Advisory Board of the Pension Research Council at the Wharton School. He was a co-author of the sixth, seventh and eighth editions of “Pension Planning: Pension, Profit-Sharing, and Other Deferred Compensation Plans” (Irwin/McGraw-Hill).

Dr. VanDerhei was featured on the PBS Frontline special: Can You Afford to Retire? He has appeared on *NBC Nightly News*, *WealthTrack*, *CNN*, *CNBC*, *MSNBC* and NPR's *All Things Considered* and has been quoted extensively in major news publications.

He received his BBA and MBA from the University of Wisconsin-Madison and his M.A. and Ph.D. from the Wharton School of the University of Pennsylvania.