



2019 CHIEF OFFICERS SUMMIT

Where Leaders Engage

June 12 – 14, 2019
Westin Michigan Avenue Chicago
Chicago, IL

CEO SUMMIT FINAL AGENDA*

WEDNESDAY, JUNE 12

4:00 pm – 6:00 pm **REGISTRATION**

5:00 pm – 6:00 pm **WELCOME RECEPTION**

THURSDAY, JUNE 13

7:00 am – 5:30 pm **REGISTRATION**

7:00 am – 7:45 am **BREAKFAST**

8:00 am – 8:15 am **WELCOME ADDRESS**

Hank Kim, Esq., National Conference on Public Employee Retirement Systems
David Clark, Arkansas Local Police and Fire Retirement System

8:15 am – 12:15 pm **GENERAL SESSION I: Leadership & Board Governance**

8:15 am – 9:15 am *Optimizing the Role of the Board: The Culture, Education & Policies
Needed to Ensure the Board & Plan Succeed*

Speaker: Rick Funston, Funston Advisory

9:15 am – 10:15 am *Habits and Traits of Successful Leaders*

Speaker: Rick Wartzman, Drucker Institute

10:15 am – 10:30 am **REFRESHMENT BREAK**

10:30 am – 11:30 am *Operations Performance Measurements*

Moderator: David Clark, Arkansas Local Police and Fire Retirement System

Panel: Mike Heale, CEM Benchmarking
Brad Kelly, Global Governance Advisors

11:30 am – 12:15 pm Facilitated Small Group Discussions

12:15 pm – 1:30 pm **NETWORKING LUNCH**

1:30 pm – 5:30 pm **GENERAL SESSION II: Pension IT & Cyber Security**

1:30 pm – 2:30 pm *Use & Manage Workflows and Member Portal*

Speaker: Peter Marsack, Tegrit

2:30 pm – 3:30 pm *Conversion or Upgrade of Technology*

Moderator: Sanford (Sandy) Rich, NYC Board of Education Retirement System

Panel: Ira Greenstein, Maryland State Retirement & Pension System
Kathy Convery, Levi, Ray & Shoup, Inc.
Jamie Vitiello, Vitech

3:30 pm – 3:45 pm **REFRESHMENT BREAK**

3:45 pm – 4:45 pm *Cyber Attacks & IT Security: The Latest & Greatest*

Moderator: Chuck Burbridge, Chicago Teachers' Pension Fund

Panel: Steve Locke, Northern Trust
Mike Del Giudice, Crowe, LLP
JD Davis, Pension Technology Group

4:45 pm – 5:30 pm Facilitated Small Group Discussions

6:30 pm – 9:00 pm **NETWORKING RECEPTION & DINNER**

FRIDAY, JUNE 14

7:00 am – 2:00 pm **REGISTRATION**

7:00 am – 8:00 am **BREAKFAST**

8:00 am – 11:00 am **GENERAL SESSION III: Disability Programs & Current Issues**

8:00 am – 9:00 am *Best Practices in Addressing Rising Costs*

Speaker: Joe Schimizzi, Managed Medical Review Organization
Erich Kelly, Managed Medical Review Organization

9:00 am – 10:00 am *PTSD & Other Mental Health Disability Filings*

Moderator: Jerry Allen, The Employees' Retirement System of the City of Milwaukee
Panel: Jeff Weiler, Fairfax Retirement System
Joe Schimizzi, Managed Medical Review Organization

10:00 am – 11:00 am *Does Public Pension Design Still Match Employees Tenures & Values?*

Moderator: Jeff Weiler, Fairfax Retirement System
Panel: Cathy Spage, Fairfax County (VA) HR Director
Dan Doonan, National Institute on Retirement Security

11:00 am – 11:45 am Facilitated Small Group Discussions

11:45 am – 12:30 pm **NETWORKING LUNCH**

12:30 pm – 2:45 pm **GENERAL SESSION IV: The Politics of Pension Funding**

12:30 pm – 1:00 pm *Significant Reforms to Public Retirement Systems*

Speaker: Keith Brainard, National Association of State Retirement Administrators

1:00 pm – 1:45 pm *The Process of Proposed/Enacted Pension Plan Changes*

Moderator: Steve Swanson, Firemen's Annuity & Benefits Fund of Chicago
Panel: Bridget Early, National Public Pension Coalition
Mary Pat Burns, Burke Burns & Pinelli, Ltd.

1:45 pm – 2:45 pm Politics of Public Pension Funding: Facilitated Small Group Discussions

2:45 pm – 3:00 pm **2020 CEO SUMMIT PLANNING & CLOSING REMARKS**

Hank Kim, National Conference on Public Employee Retirement Systems
David Clark, Arkansas Local Police and Fire Retirement System