RETIREMENT SECURITY FOR ALL: A FORUM ON STATE ACTION
The New School, Wolff Conference Room, 6 East 16th Street, Room 1103
September 14, 2012

9:00    Continental Breakfast

9:15    Welcome and Introductions
        David Van Zandt, President, The New School
        Teresa Ghilarducci, Director, Schwartz Center for Economic Policy Analysis (SCEPA)

9:35    Overview of Retirement USA Principles
        Karen Friedman, Executive Vice President and Policy Director, Pension Rights Center

        New York State Comptroller Thomas P. DiNapoli

10:05   Facts on the Ground: Proposals in Action
        Moderator: Teresa Ghilarducci
        • California State Senator Kevin de León
        • Connecticut State Comptroller Kevin Lembo
        • Pennsylvania State Treasurer Rob McCord
        • New York City Comptroller John Liu
        • Steve Toole, Director of the North Carolina Retirement Systems for the Department of State Treasurer
        Q&A: 20 – 30 minutes

11:30   Break

11:40   Policy Details: Other Options for Retirement Security for All
        Moderator: Karen Ferguson, Director, Pension Rights Center
        (5 min each)
        • Guaranteed Retirement Accounts (GRA 2.0) - Teresa Ghilarducci, SCEPA Director
        • Secure Choice Pension - Hank Kim, Executive Director, National Conference on Public Employee Retirement Systems (NCPERS)
        • USA Retirement Funds - Michael Kreps, Senior Pension and Retirement Counsel, U.S. Senate Committee on Health, Education, Labor, and Pensions
        • Other Options - Michele Varnhagen, Chief Policy Advisor/Labor Policy Director, U.S. House of Representatives Committee on Education and the Workforce
        Q&A: 15 minutes

12:30 – 12:50 Lunch
12:50 – 1:10 Public Perceptions of Pensions
Moderator: Heather McGhee, Vice President Policy and Research, Demos
  • Daniel Gotoff, Partner, Lake Research
  • Presentation of polling data on retirement issues, state plans & study done for NCPERS
Q&A: 20 minutes

1:30 Discussion: Obstacles and Opportunities
Moderator: Norman Stein, Senior Policy Advisor, Pension Rights Center and Professor, Earle Mack School of Law, Drexel University
  • Moderator presents obstacles to state action: federal preemption, industry opposition
  • Moderator asks stakeholders to discuss their experience, efforts and ideas to overcome obstacles

2:30 Discussion: Next Steps for State Action for Retirement Security
Moderators: Karen Friedman and Bridget Fisher
  • Short summary of the day
  • What do state officials and legislators need from stakeholders/constituent groups to support action? Research, advocacy, messaging, media
  • Following up: future collaboration and strategies (task forces, communications)

3:00 Closing Remarks: Teresa Ghilarducci