

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

9:45 Keynote, "Why Retirement Security for Both Public and Private Sector Workers Matters to States"

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