

May 2, 2016

## **EBRI-ERF POLICY FORUM #78**

### **Employee Engagement in Health and Retirement Challenges and Reforms**

Sponsored by the Employee Benefit Research Institute (EBRI) and Education and Research Fund (ERF)  
20 F Street NW Conference Center  
20 F Street, NW, Suite 1000, Washington, DC 20001  
Thursday, May 12, 2016  
Presentations: 8:30 a.m. – 12:50 p.m.  
Light breakfast at 8:00 a.m. and light lunch at 12:50 p.m.

### **AGENDA**

**8:30 a.m. - 8:35 a.m.**                      **Welcome**

Harry Conaway, President and CEO, EBRI

### **Innovations in Employee Engagement in Health**

**8:35 a.m. – 9:05 a.m.**                      **IBM's Commitment to a Culture of Health and Watson Health**

Over its 105-year history, IBM has demonstrated a commitment to a culture of health to assure that the "healthiest and safest choices are the easiest choices." In the past year, IBM has also made a commitment towards transforming health/healthcare with the creation of Watson Health, whose mission is to serve as a catalyst to improve lives and reduce costs through partnerships and the power of cognitive insights through the many different stakeholders in the health/healthcare ecosystem, including employers.

[Dr. Kyu Rhee](#), IBM's Chief Health, will talk about IBM's commitment to a culture of health and its efforts in Watson Health with a focus on the perspective of employers and employer-based health benefits.

**9:05 a.m. – 9:50 a.m.**                      **Behavioral Economics and Employee Engagement – Carrots, Sticks or Something Else?**

[J. David Johnson](#), Vice President and Senior Consultant for Segal Consulting / Sibson Consulting, will discuss the growing body of research in Behavioral Economics that provides important insights to benefits professionals concerned with driving employee engagement in health improvement programs, highlighting where incentives can be most effective, how to increase their impact and what other strategies can be used to drive long-term behavior change in employees.

Alan Momeyer, Vice President of Human Resources Emeritus, The Loews Corporation, will discuss how Loews used Behavioral Economics to engage workers in their health.

Moderator: [Murray N. Ross, Ph.D.](#), Vice President, Kaiser Foundation Health Plan, Inc., and Director, Kaiser Permanente Institute for Health Policy

**9:50 a.m. – 10:35 a.m. Innovation to Improve Health, Well-Being and Value**

Michael Thompson, Principal, [PricewaterhouseCoopers LLP](#), and President and CEO Elect of the [National Business Coalition on Health](#), will discuss how innovation in technology and incentives can be used to improve health, well-being, and value.

[Peter Goldbach, MD](#), Chief Medical Officer, Health Dialog, will (i) present information on a new clinical analytic that tracks a population's state of health and disease over time and (ii) share insights on how this enhances the understanding of population management opportunities, the ability to provide service, and how it can improve outcomes.

Moderator: [Tami Simon](#), Managing Director, Knowledge Resource Center, Buck Consultants LLC

**10:35 a.m. – 10:45 a.m. Break**

## **Retirement Challenges and Reforms**

**10:45 a.m. – 11:15 a.m. Bipartisan Policy Center Commission on Retirement Security and Personal Savings**

[G. William Hoagland](#), Senior Vice President, Bipartisan Policy Center, will describe the two years of work of the Bipartisan Policy Center's Commission on Retirement Security and Personal Savings and provide an overview of six challenges to retirement security addressed by the Commission. [BPC Commission webpage](#).

**11:15 a.m. – 11:45 a.m. Who's In, Who's Out – A Look at Access to Employer-Based Retirement Plans and Participation in the States**

[John Scott](#), Director, Retirement Savings, The Pew Charitable Trusts, will discuss how access to and participation in employer-sponsored retirement plans varies a great deal around the country, how federal and state policymakers are trying to address this challenge in a variety of ways, and how these different policy approaches present their own challenges and tradeoffs that policymakers must consider. [Report](#). [Data visualization](#).

**11:45 a.m. – 12:15 p.m.**      **Research and Perspectives on Turning Savings Plans into Retirement Plans**

[Fredrik Axsater](#), Global Head of Defined Contribution, State Street Global Advisors, will lead an interactive discussion outlining an actionable path for how we can help participants by transitioning today's defined contribution savings plans into retirement plans.

**12:15 p.m. – 12:45 p.m.**      **Reducing Leakage & Incubating Savings**

[J. Spencer Williams](#), President and CEO, Retirement Clearinghouse, will discuss Retirement Clearinghouse's use of a dynamic simulation built on a foundation of research and practical experience to illustrate the beneficial outcomes of improved plan-to-plan portability for America's mobile workforce, with a specific focus on reducing leakage and incubating accounts for small balance savers via Auto Portability.

### **Closing**

**12:45 p.m. – 12:50 p.m.**      **Sum Up and Thank You**

**12:50 p.m. – 1:30 p.m.**      **Light Lunch**