



**EBRI SPRING POLICY FORUM**

**#91**

Focusing on Retirement, Health, and Financial Wellbeing

**May 10, 2022**

**11:30 a.m. to 4:30 p.m.**

**Hybrid Event**

**F Street Conference Center**

**Wi-Fi Network: DCCTR**

**Password: meeting2015DC**

**Moderated by:**

[Lori Lucas](#), President and CEO, Employee Benefit Research Institute

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**AGENDA**

**11:30 a.m. – 11:45 a.m.**

**Welcome**

**11:45 a.m. – 12:45 p.m.**

**What is Driving the Great Resignation/Retirement—and What Does the Future Hold for the Labor Force?**

The COVID-19 pandemic has dramatically reconfigured the Americans labor force — with many leaving or retiring in unexpected ways. As the economy opens up and the workplace begins to return to normal, how will various demographic groups reenter the labor force? With EBRI research and insights from experts, this panel will explore the reasons that workers are staying out of or returning to the workplace. How are workers supporting themselves if they are choosing not to return, and

what can employers do to entice them back? Will retirement preparedness be affected?

**Speakers:**

- [Craig Copeland](#), Director of Wealth Research, EBRI
- [Fiona Greig](#), Co-President, JPMorgan Chase Institute
- [Ragan Decker](#), Senior Researcher, Strategic Researcher Initiatives, SHRM
- [Chantel Sheaks](#), Vice President, Retirement Policy, U.S. Chamber of Commerce, Moderator

**12:45 p.m. – 1:45 p.m.**

**Networking Lunch and Keynote Speaker**

Amber Rivers, Director, Office of Health Plan Standards and Compliance Assistance at the U.S. Department of Labor will provide a keynote address. Amber will provide an overview of recent activity within her Office, as well as what is on the horizon, including regulation related to the Consolidated Appropriations Act's provisions on Mental Health Parity, COVID 19, the No Surprises Act, and Transparency in Coverage.

**Speakers:**

- [Amber Rivers](#), Director, Office of Health Plan Standards and Compliance Assistance, U.S. Department of Labor
- [Jody Dietel](#), Special Advisor, Government Affairs, HealthEquity, Moderator

**1:45 p.m. – 2:45 p.m.**

**Debt and Financial Security: Challenges and Possible Solutions**

Debt is a key — and particularly challenging — factor when it comes to financial wellness and retirement saving. This session will examine levels and types of debt held by American workers and retirees using EBRI research — including how debt has changed from prior generations. Our panel of experts will also discuss how employers and financial wellbeing programs can address the debt issue as well as how retirement savings are being impacted by the debt of workers today.

**Speakers:**

- [Craig Copeland](#), Director of Wealth Research, EBRI
- [Alex Smith](#), Chief HR Officer, City of Memphis
- [Jay Washington](#), Associate Vice President, Diverse Markets, Voya
- [Liz Varley](#), Vice President, Federal Government Affairs, Ameriprise, Moderator

**2:45 p.m. – 3:15 p.m.**

**Break**

**3:15 p.m. – 4:15 p.m.**

**The State of Mental Health in the Workplace**

Mental health disorders such as depression and anxiety have been rising in the workplace and beyond — exacerbated by the COVID-19 pandemic. The Workplace Wellness Survey shows that one-half of workers are at least moderately concerned about their emotional well-being. And workers and employers strongly agree that employers have a responsibility for workers' mental health. This panel will address the state of mental health in the workplace using recent EBRI research and insights from industry experts on how employers can address their workers' mental health. Issues related to public policy will also be discussed.

**Speakers:**

- [Katy Riddick](#), Senior Director, One Mind at Work
- [Paul Fronstin](#), Director of Health Research, EBRI
- [Adam Beck](#), Vice President, Employer Health Policy & Initiatives, Commercial Exchange Policy & Operations, AHIP
- [Jennifer Posa](#), Global Head for Employee Mental Wellbeing & Workplace Effectiveness, Johnson & Johnson
- [Sandra Diaz-Castillo](#), Head of Research and Insights, U.S. Commercial Global Market Research and Insights, Cigna, Moderator

**4:15 p.m. – 4:30 p.m.**

**Wrap-Up**