

# NPEA

July | 2014

# Options

NATIONAL PENSION EDUCATION ASSOCIATION

## Message from President, Aimee Rives



### Blazing the Trail in Retirement Education

To blaze a trail means to perform pioneering work, or to do something that no one has done before, especially something that will be important to other people. This is the very ideal upon which NPEA was founded – to

introduce the concept of retirement planning education to public retirement systems and to encourage and guide the growth of developing programs and services. Since the association's inception in 1987, NPEA has been a pioneer at the forefront of pension education and we continue that work each year. This October, NPEA is heading west to Portland, Oregon for our 34th annual conference.

I am very excited about this year's conference. The agenda features experts who will update us on what's happening in the public pension industry, and how we can help safeguard the financial future of our members. We'll have sessions that

provide us with new and exciting tools to get our message across to our diverse memberships. We will have important information to share with our retirees to protect their benefits and finances. Read more on page 3.

Before I get too far ahead of myself with the 2014 conference, let's take a moment to look back on the 2013 Charleston conference. There was that incredibly dynamic presentation on creative communications strategies from Steve and Cindy Crescenzo. One system, Middlesex County Retirement, has put several key lessons learned from that presentation into practice. In their spring newsletter, they told their membership about changes they were making to enhance customer service, which includes a revamped, one-stop shop website. They also used catchy headlines and a poignant and personal member story to capture their readers' attention – one of our many challenges, competing for the attention of our members in a 24-7 news and information cycle. All that and a callout to NPEA - thanks to Middlesex County Retirement for the great write-up!

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Check us out on Facebook at [www.facebook.com/NationalPension](http://www.facebook.com/NationalPension)

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Register Today for 2014 Conference!  
*See Page 2 for more details*

## Welcome to Portland—The City of Roses

Many come to Portland knowing little about the city compared to other destinations on the west coast. As we discovered during our 1990 annual conference, however, once you experience Portland's rich culture, history and urban design, you will leave with a pledge to return. NPEA is excited to be returning to Oregon in October.



Portland is located at the confluence of the Willamette and Columbia rivers and was first explored by Lewis and Clark in 1805 during their famous western expedition. In the years that followed, the city's

location and rich natural resources brought explorers, traders and trappers who blazed the trails that opened up the Northwest Territory to settlement.

The city is known for its many outdoor activities and scenic beauty. You can find sandy beaches to the west, great gorges along the rivers and snow-capped Mount Hood to the east.



The climate of warm, dry summers and wet, cool-to-chilly winters is ideal for growing roses, which can be found in the many parks and gardens, giving it the title – the City of Roses. A visit to the beautiful Washington Park International Rose Test Garden is a must-see for visitors.



Today, Portland is known for its environmental consciousness and recognized as one of the most bicycle-friendly cities in the world. Some of the other things the city is noted for are coffee houses, microbreweries and more than 600 food carts with the world's best street food. There is a vibrant music and arts scene, as well as a blend of historical and modern architecture. Portland is a large city with a laid-back, small town feel.

Bring your most comfortable walking shoes and a light jacket when packing for the conference. The average temperature in October is a high in the mid 60's and a low in the mid 40's. October's average rainfall of 3.1 inches makes packing that fold-up umbrella a good idea, too.

We trust when you leave Portland after attending the conference, you will pledge a return trip like so many visitors to this beautiful city.

### CONFERENCE REGISTRATION FOR PORTLAND NOW AVAILABLE ONLINE:

- ◆ Registration and hotel booking information is available on the NPEA website [www.npea.com](http://www.npea.com).
- ◆ The historic **Benson Hotel**, in the heart of downtown Portland, will be our host for the conference.
- ◆ The **conference registration fee remains at \$695** for NPEA members, one of the lowest fees for similar events in our industry.
- ◆ The **deadline for the conference hotel room rate is September 24, 2014.**

# 2014 Conference Highlights

PORTLAND, OREGON | OCTOBER 25-29, 2014



## **David Keeling, Keynote**

*Make Them Laugh, Make Them Think: Understanding the Learning Brain*

Author, actor, humorist and motivational speaker, David Keeling has worked extensively throughout the United Kingdom and abroad using energy and entertainment and a little bit of magic to teach school communities, organizations and corporations, enabling people through humor and laughter to see the world in a more positive light and to show the power that humor has as a tool for change and communication.



## **Dana Bilyeu, NASRA Executive Director**

*The Public Pension Policy Debate*

Dana Bilyeu, the Executive Director of the National Association of State Retirement Administrators and former executive officer of the Public Employees' Retirement System of Nevada, will discuss the ongoing public pension policy debate, NASRA's research and response, and the direction the debate and press coverage is headed.



## **Randy Krum, President, InfoNewt LLC**

*Data Visualization: The Science, Design and Strategy Behind Infographics*

Randy Krum, author of *Cool Infographics: Effective Communication with Data Visualization and Design* and the blog [coolinfographics.com](http://coolinfographics.com), focuses on telling visual stories with data. He is a frequent speaker for professional organizations, MBA classes, corporate meetings and government agencies. He was recently honored to be selected as the 2012 Central Intelligence Agency speaker series presenter.



## **Dr. Marion Somers, Ph.D**

*Helping Our Retirees Stay Safe – Physically and Financially*

Dr. Marion Somers, elder care expert and author of *Elder Care Made Easier*, has appeared on numerous news shows and quoted in major newspapers and print media. Her *Dr. Marion Minute* airs on more than 300 radio outlets coast to coast. Her major focus today is fighting financial fraud against seniors and educating people to avoid accidents and stay safely in their homes.



## **Kevin Seibert, CFP, CRC, CEBS**

*Managing Your Retirement Income and Retirement Readiness Assessments*

Kevin Seibert, Managing Director of the International Foundation for Retirement Education (InFRE) and co-author of the Managing Retirement Income professional education series, presents these two Certified Retirement Counselor (CRC) courses, taken by more than 12,000 CRCs since 2004.

## IN ADDITION:

**Tom Lussier** offers *A Word from Washington*.

**Robert Klausner, Esq.** provides the national *Pension Case Law Update*.

**Mark McChesney** asks *Is There an App for That?* in his discussion on Internet applications.

**Dennis Gatlin** presents *Ethics for Pension Professionals*.

**Larry Langer** and **Mary Vanek** discuss communication challenges of *Implementing GASB 67/68*.

**NPEA member systems** share best practices and programs in breakout sessions.

# Serving on the NPEA Board of Directors

## NPEA seeking nominations

Serving on the NPEA Board of Directors can be a rewarding and fulfilling experience. It comes, however, with responsibilities, duties, and commitments that are essential to achieving NPEA's mission of promoting and expanding retirement education programs and communication initiatives for public employees across the country.

### Board Member Responsibilities

Because the Board plays such a vital role in NPEA, individual members on the Board must fulfill certain obligations including:

- Supporting the mission of NPEA and working to implement its goals.
- Building relationships with NPEA members.
- Demonstrating a willingness to work as part of a team.
- Traveling to and participating in at least two Board meetings per year.
- Actively participating in the planning, organization, and implementation of the annual conference.
- Participating in conference calls when required.
- Taking on Board officer duties, such as Secretary or Treasurer, and accepting special assignments such as mailing annual invoices, updating the website, preparing the conference workbook, etc.
- Being prepared to participate fully in all meetings.
- Keeping up to date on public pension issues and communication trends.

If you are an NPEA member who would like to serve on the NPEA Board, please submit a letter of interest addressing your willingness and ability to fulfill the responsibilities outlined in this article, and provide a letter of approval from your executive director, or other appropriate executive of your retirement system to any NPEA Board member by **September 15, 2014**.

### Selecting a Board Member

When a vacancy on the Board is anticipated, as will generally be the case every two years, the Board announces the vacancy and solicits letters of interest from the NPEA membership. The criteria the Board considers when reviewing letters of interest include:

- Does the candidate have the support of his/her system and executive director, and the assurance that he/she will be granted administrative leave to participate in board meetings? In addition, does the candidate's system agree to pay for attendance at the annual conference?
- Will the candidate commit to expend both the work and personal time necessary to attend meetings and to accomplish the goals of the organization? Board meetings require travel and time away from home and work, and are generally held over a four-day period, which includes a Saturday and Sunday. Since NPEA does not have an office or full-time staff to accomplish needed tasks, the Board members and the part-time administrator divide assignments and rely on each other to provide a finished product in a timely manner.
- Is the candidate's system a supporter of NPEA and do they regularly send participants to the annual conference? Has the candidate actively participated in previous annual conferences?
- Are the mission and goals of NPEA consistent with those of the candidate's system? Does his/her system recognize the importance of quality retirement education and communications?
- What does the candidate hope to accomplish while serving on the Board?
- What experience, skills and accomplishments would the candidate bring to the Board?

The information submitted by the candidates is evaluated by the Board's nominating committee. The nominating committee makes a recommendation to the Board, and the recommendation is voted on by the Board. The Board's candidate selection is then ratified by the full membership at the annual business meeting, which is held at the annual conference.

We recognize we would not have achieved success as a national leader in public pension education, without the dedicated Board members who have served NPEA through the years. Although the Board of Directors changes over time, all who serve must remain steadfast in their commitment to NPEA, continue to encourage and guide the development of programs and services, and challenge experienced counselors, educators, and communications officers to achieve greater success.

# Contact Us

## Message from President

*Continued from Page 1*

NPEA is also revamping our website. We hope you find it is more user-friendly and easy to navigate. We also would like to begin featuring stories from our member systems on a regular basis. If you have a story to tell, whether it is good, bad or ugly, we'd like to hear from you. One of our challenges is fostering continued networking between the annual conferences for our member systems. Our new site will also feature a Member News Blog. Hopefully, this will allow much easier collaboration throughout the year. We'll talk more about the new site at the conference in Portland.

For many years, our association has enjoyed a partnership with the International Foundation for Retirement Education (InFRE). Through its Certified Retirement Counselor (CRC) certification program, retirement planning professionals must demonstrate a mastery of retirement issues facing workers today. Many of our conference participants have the CRC designation and are able to satisfy their continuing education requirement by attending the qualifying sessions. The InFRE workshop this year, which is open to all attendees, will feature ethics and two of the core retirement income and readiness certification courses.

Your NPEA Board of Directors has worked very hard throughout the year to create a program to showcase new ideas and best practices in our industry. We continue to take the conference to different regions of the country in an effort to allow more systems to participate. We invite you to join us this October in Portland as we continue "Blazing the Trail" for our members and serving as pioneers in our industry.

*"Do not go where the path may lead, go instead where there is no path and leave a trail."*

— *Ralph Waldo Emerson*

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