2015 NW Pension Peer Conference – Portland, OR

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Conference Summary Report

I would like to thank you, members of the board, for approving my attendance at this year's Northwest Pension Peer Conference. I found great value in the conference, as this is a smaller group of approximately 30 individuals that work in the public pension industry from British Columbia, Idaho, Montana, Nevada, Oregon, Washington, and Utah. This setting allowed for more discussions within sessions, flexibility with overall schedule, and quality in networking relationships.

One of the first sessions didn't relate directly to pension administration but instead focused on the people of our agencies. Representatives from Washington shared their story of how they transformed the agency from a top-down management model to a bottom-up model. Before the transformation, all decisions were made at the management level and communicated to the staff without input from the staff. This created an environment where staff was told what to do and had to ask permission for all decisions and the net result was poor member satisfaction. It also created an environment where few people wanted to join the agency and recruiting talent was difficult. Three years into this transformation, they now have an environment where people provide feedback at all levels, which has resulted in better member satisfaction and an abundance of applications for open positions. They accomplished this by creating an environment of transparency and accountability. Team members (no longer called staff) have a process for providing input on the health of the agency and a special guiding team was formed to provide feedback in the case that individual feedback was lacking. Leaders use the feedback to measure the amount of team engagement in the agency and make adjustments as needed. They also want to ensure that those that come into the agency are a good fit for their model and they complete a quantitative profile for each candidate and compare that to the ideal for the position. This profile also helps them assess the leadership potential for candidates and those in the agency. These changes have been helpful for Washington. I personally believe in transparency and gathering decision-making input from team members. I don't gather feedback from the team members of how they rate the health of our team, and that is an area I'd like to improve.

The representatives from British Columbia did a presentation on the redesign that they're doing for their public facing website. They were able to conduct research on their website and found that the structure wasn't working for their members and employers. The content was based on organizing their governing rules. For example, if a member wanted to change a beneficiary, the individual would need to select the retirement system and then follow a couple of links to take them to a page of governing-based instructions. Their research indicated that people would give up and call the agency when looking for answers to their questions. This feedback directed the agency to look at how they organize their content. Instead of providing governing text on pages for people to read to get answers, they are adopting a structural approach to content. This structure helps a member through a topic, and within each topic, tasks. These tasks are selected based on the call volume the agency receives and affects not only whether a task appears on the page, but also in which order it appears. For example, they have a topic for “life happens” and they were anticipating maternity leave would be the top task. However, they get more calls regarding divorce and separation, which drove that task to the top of the list. Once the member gets into the task, there’s information about the task and the option to view the governing rules through another link. I enjoyed this presentation and I think it will be valuable information next time we reorganize the content on our site.

Another interesting session was more technical in nature and was regarding the choice between a full system replacement and extending an existing system. Every system has “technical debt” which is any part of an application that is either incomplete or poorly designed. When faced with this technical debt, we can either look to replace the application or extend it to meet our needs. Modern technologies make the extension of an application easier, as those technology upgrades can happen as we modify or add features. As this relates to MPERA, the system replacement that is in progress is necessary to get our applications on a foundation that will allow us to extend in the future.

This conference provided a valuable experience for networking and knowledge sharing. I thank you again for the opportunity.