

# Chief Benefits Officer Update

Patrick Lane | Chief Benefits Officer



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# Benefits Update

- Benefits Leadership Team
- Strategic Pillars Deployed in 2024
- Pension Administration System
- Division Updates
- Focus on our People

- ✓ Benefits Services
- ✓ Customer Service
- ✓ Insurance
- ✓ Member Education



# PERA Benefits Leadership Team



**Matt Carroll**  
Benefit Services



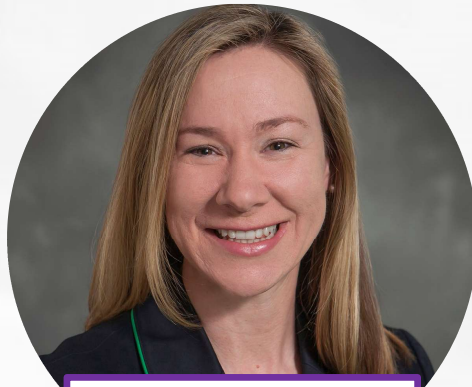
**Jessica Linart**  
Insurance



**Nancy Graham**  
Benefit Services



**Una Bearden**  
Benefit Services



**Kirsten Lopkoff**  
Member Education



**Phil Hill**  
Customer Service



# Strategic Pillars Deployed in 2024

- 1 | Modern Transactions and Engagement**
- 2 | Business Process Improvement and Modernization**
- 3 | Renewed Focus on Customer Experience**
- 4 | Data-driven Decisions - Driving Outcomes and Measuring Effectiveness**
- 5 | Investing in Staff - Development, Engagement and Succession**

# Pension Administration System Update

- ✓ Linea assessment completed
- ✓ Choice of Buy vs. Build
- ✓ Collaborative analysis between Executive, Benefits, I.T., and Application Development teams
- ✓ Ready to engage with new CEO





## 2024 | Benefit Services

- New investments in Employer Engagement
- Digital initiatives and mobile app enhancements
- Improved workflow management and revised internal service level agreements
- Comprehensive process mapping to inform PAS modernization



## 2024 | Customer Service

- Genesys Cloud and venture into AI tools
- Exciting new data to drive efficiency and improve service
- Forming Operations Team to improve off-phone tasks
- New wellness tools to support agents in high-volume environment



## 2024 | Insurance

- RFP for Medicare PPO and HMO and select two or more carriers who can best serve PERA's Medicare population by providing a highly rated, competitively priced plan
- Review of the Pre-Med PPO plans with the goal of offering a new, better-priced plan option for retirees in the Denver Metro area



## 2024 | Member Education

- Wrap up version 1.0 of quick-tip (“short-form”) videos, pivot to “medium-form” offerings
- Collaborate on employer-facing engagement initiatives
- Deep dive on data to inform member preferences, support promotions, and understand member personas
- Leverage internal change management resources



# Staff Certifications & Upskilling



**Jody Auer**  
eLearning Modern Virtual Design



**Chris Kamp**  
Microsoft PowerBI



**Sheila Chehelakhtarani**  
Certified Retirement Counselor



**Kirsten Lopkoff**  
Organizational Change Management



**Cindy Jones-Shoeman**  
Digital Marketing



**Jeanna Lovato**  
Paralegal



**Aimee Buccholz**  
Organizational Change Management  
Microlearning  
Conflict Resolution for Managers

**Questions?**

