

## CONTACT

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## CAREER SNAPSHOT

My career has spanned three primary professions: public pension administration, human resources and information technology. In all three areas, I held executive-level roles where I brought a high degree of results-orientation through effective teaming and collaboration. With the philosophy that sustainable outcomes can only happen through the support of the right people doing the right things in an accountable management system, I have been successful in accomplishing challenging work in a variety of organizations and environments. I am an effective and accomplished leader and enjoy working with people through the unique challenges faced by public and private entities alike. In 2012, I began guest speaking a course at the University of Washington Evans School on performance management, including how the Department of Retirement Systems is implementing lean, and the role of leadership in creating a high performing organization. I have experience working with diverse perspectives through my role as the Chair of the Washington State Investment Board, former chair of the Pension Funding Council and as a member of the Select Committee on Pension Policy.

## COMPETENCIES

- 15 years experience in public pensions
- Effective communicator with high verbal reasoning skills
- Strategic agility to lead complex organizations
- Leadership attributes that promote high performing teams
- Effective at working in a complex organizational and governance structure
- Ability to gain trust through strong interpersonal and relationship building skills
- Diverse background with multiple professional experiences
- Facilitative leadership style
- Comprehend complex topics and can synthesize data into action
- Comfortable interacting and working with boards and advisory committees

## REFERENCES

[REDACTED]  
Department of Retirement Systems

[REDACTED]  
Office of The State Actuary

[REDACTED]  
Department of Retirement Systems

[REDACTED]  
Washington State Student Achievement Council

[REDACTED]  
Washington State Investment Board

[REDACTED]  
Washington State Investment Board

JANUARY 2013 TO PRESENT

**Department of Retirement Systems****Title: Executive Director**

The Washington State Department of Retirement Systems (DRS) is the administrator of 8 public systems with 15 different plans and a 457 Deferred Compensation Program. Pension assets managed by the Washington State Investment Board are 80 billion with total AUM at 103 billion. DRS' actuaries are a separate public agency reporting to the legislative branch. The Washington governance structure is unique and requires a high level of strategic agility to be effective. My role is to provide that strategic agility ensuring that members, stakeholders and decision makers are well informed about benefits, contribution rates/funding and investments. I also serve as the designee on national and local boards and committees. I serve as one of ten voting members on the WSIB, with my current responsibilities also including Chair. Also a board member for the International Center for Pension Management (ICPM).

DRS has 250 team members and serves 500,000 members who are either active, retired or inactive with funds left on account. Over the course of the last 5 years, I have been leading significant organizational change to become a customer-satisfaction driven agency with a high level of team engagement. I have also implemented a comprehensive management system, which includes a fundamentals operational system for all expected outcomes and core processes. Performance is discussed in a quarterly target review format, attended by all agency leaders and lean green belts and black belts. Performance management is a cornerstone to the five key goals of Elated Customers, Engaged Team Members, Vigilant Resource Steward, Best Practice Leader and Reliable Partner.

My role is both inwardly and externally focused, ensuring that all aspects of DRS reputation are managed appropriately, within our core values. I speak on behalf of the pension system throughout the state, touching on all facets of public employee pensions. As a cabinet appointee, it's important to demonstrate a sound knowledge of the system in order to build trust, respect and

MARCH 2009 TO JANUARY 2013

**Department of Retirement Systems****Title: Deputy Director**

Washington was the first public system to implement hybrid retirement plans. As a result, the entire organization went through significant change and ultimately a culture shift. Part of this shift was due to the newly required daily environment, new knowledge requirements, new on boarding processes, communication requirements, and new relationships with third party record-keepers and the WSIB. The hybrid plans were brought into existence in three separate waves with Teachers (TRS Plan 3) being first, Public Employees (PERS Plan 3) second and School Employees (SERS 3) third. I held various roles in each successful implementation and accumulated both technical and management skills in their delivery.

Responsible for all facets and functions of administering benefits, including organizational and strategic planning, ensuring alignment with the changing needs of the membership, stakeholders and team members. Maintained a high level of transparency in how the 15 public retirement plans are administered. Ensure effective risk management plans and processes are in place and are consistently tested. Support a high performing team culture focused on customer and job satisfaction. Organize the structure to provide optimum performance, eliminating barriers to accomplishing the mission. Oversee the development of the biennial budget including funding for 250 employees and large contracts for third party record-keeping and shared services. Develop key communication materials that distinguish and demonstrate the value of Washington's pension system, including development of branding and identity pieces. Deliver presentations to various audiences including member and retiree organizations, legislative committees, advisory committees, boards, and the media.

**JULY 2005 TO MAY 2008**

**Department of Retirement Systems**

**Title: Senior Assistant Director for Operations**

As the Chief Operations Officer, established strategies and actions to positively impact the core business areas for retirement services, including the Deferred Compensation Program, trust fund accounting and financials, employer consultation and compliance and information technology. Led the Communication and Outreach initiatives. Engaged the organization to continually look at customer improvements, process improvement and budgetary efficiency gains. Expanded the use of information technology as a bridge to solving the gap in available resources and increasing workloads. Ensure service delivery was done in a manner that met the needs of customers as well as demonstrating the department's fiduciary role and sound financial reporting responsibilities. Developed successful marketing campaigns to increase the participation in the Deferred Compensation Program. Managed the Legal Services team including the legislative liaison and petitions examiner.

**APRIL 2003 TO JULY 2005**

**Department of Retirement Systems**

**Title: Assistant Director for Information Services (CIO)**

As the Chief Information Officer, planned, directed and managed statewide information technology services. Directed the overall information technology planning for systems that affected service levels for retirement system members and 1,350 public employers. Provided strategic direction to a core management team overseeing information technology activities in the areas of application programming (both mainframe and client-server), local and wide area networks, telecommunications, workstation support, and data administration. Served as the primary contact interfacing with oversight entities and partners to implement statewide technology and business initiatives. Ensured the agency's strategic direction was in concert with enterprise services. Improved the effectiveness and morale of the information technology team by instituting processes that aligned career and creative interests with sound performance management.

**JUNE 2001 TO APRIL 2003**

**Department of Retirement Systems**

**Title: Human Resource Director**

Responsible for the administration and planning of all human resource functions. Served as the key advisor and consultant to the executive management, human resource team, and agency employees. Advise the executive team and provide expert knowledge on federal and state law, policy interpretation and mediation and facilitation of workplace issues and topics. Managed issues relating to labor relations and workforce development. Developed a comprehensive talent management program that included innovative recruitment and retention strategies, policy and procedure development, classification and compensation within the guidelines of the Civil Service laws, and performance management related to employee learning and development.

**NOVEMBER 2000 TO JUNE 2001****Department of Retirement Systems****Title: Senior Project Manager**

Responsible for delivering high impact projects across the organization within scope, budget and schedule. Implemented new hybrid retirement plans and large technology projects including a comprehensive imaging management system that had two components, business process workflow and back file. Managed vendor deliverables in accordance with delivery-based contracts. Created a project management framework with associated course certification materials. Prepared and conducted change management sessions to transition people from old processes to new. Developed expert level skills in contract negotiation and management and subsequent escalation management.

**OCTOBER 1997 TO NOVEMBER 2000****Department of Labor and Industries****Title: Benefits Administrator**

Managed a diverse team responsible for all compensation and benefit programs for 2700 public employees across 26 different locations. Implemented the first human resource technology systems for the State of Washington, including time and leave reporting, hiring and employee development. Implemented the VEBA-MEP program and the Family Medical Leave Act provisions.

**OCTOBER 1985 TO OCTOBER 1997****Department of labor and Industries****Title: Multiple roles**

Progressed through a variety of classifications starting with clerical responsibilities and ending with an appointment into the Washington Management Service. These positions allowed me to gain a full understanding of public sector human resources at the same time emphasizing analysis and the use of technology. Developed skills through a variety of channels, including formal training and mentoring, that were geared toward an emphasis in HRMS applications and people management.