



Duquesne University case study

If your benefits experience doesn't make the grade, how can you drive engagement?

When it comes to retirement benefits, you're always trying to find a balance between offering enough options so employees can choose what works best and providing a simple experience that encourages consistent participation.

If you had asked John Greeno, Assistant Vice President and CHRO, to grade Duquesne's performance in these areas back in 2018, he probably would've given the university an "A" for choice but a lower grade for user experience. "We were administering multiple vendors with a paper-driven process and without a unified online resource," says Greeno.¹

The plan administrators were having to prep hard copy enrollment kits and enter high volumes of data into their systems—without introducing any errors. Meanwhile, employees had no single site available to manage their enrollment and plan contribution elections.

As a result, only 35% of employees were accessing their accounts online at this time.

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—John Greeno, Assistant Vice President and CHRO, Duquesne University¹



A three-fold plan for improvement

Hoping to get that user experience grade up, the team at Duquesne put out an RFP for multivendor coordination and compliance services. The university prioritized three goals as it evaluated potential partners. The new solution had to:

- Simplify the participant experience to drive plan engagement
- Streamline administration to increase efficiencies and reduce costs
- Support the unique plan designs the university wanted to offer

As it turns out, it was that last point that really guided the Duquesne team to their best-fit partner.

The university had designed a plan that would switch from a voluntary match to mandatory participation once an employee passed a certain age/service threshold. TIAA put together a total package that addressed all of the above.

“Duquesne University was extremely pleased with the steps involved to implement our new process,” says Greeno. “TIAA’s ability to listen to our needs, understand our unique and complex plan requirements, and then create a system that met these needs to properly administer the plan was outstanding.”¹

The core of the Duquesne multivendor solution includes:

- **A singular web experience**, accessible via single sign-on through Duquesne’s secure portal, where participants can enroll, view plan balances and access information across all plans and providers.
- **A collection of TIAA services**, such as Compliance Coordinator® and Fee Disclosure Assist Service, for seamless aggregation of investment provider information, data sharing and reporting on the back end.
- **TIAA’s eligibility service**, which can track prior service at an eligible employer to support waiting periods and the transition from voluntary to mandatory periods of plan participation. This service requires plan sponsor confirmation and manual data entry at the time an eligible employee is hired.

Partnership benefits:²

Increased online utilization by



Reduced plan fees by



Created Duquesne-specific benefits brand





Deeper engagement, reduced costs, differentiated brand

Since implementing the Multivendor Coordinator solution, Duquesne has seen the number of employees accessing accounts online jump by nearly 25%, proving the value of simplified access with single sign-on. This became even more important as all parties moved to a virtual environment due to the COVID-19 pandemic. And from an administrative standpoint, the university has been able to eliminate paper forms and streamline a number of administrative services—all while reducing plan fees by 31%.

Additionally, Duquesne partnered with TIAA Marketing to create a brand around its retirement benefits, driving employee engagement through TIAA-run orientation events, a video series, virtual counseling sessions and more.

Concludes Greeno: “Our employees appreciate the improvement in their user experience resulting from the new online portal to enroll in the plan, review contributions and complete changes as desired.”¹



1. Testimonials were provided by current clients, and no cash, non-cash, direct or indirect compensation was given in return. No material conflicts of interest exist on the part of the individuals giving the testimonials.
2. Time period was 3/31/2018-12/31/2018.

Time period was 3/31/2018-12/31/2018. Results experienced by the institution may not be typical of all plans. Individual results and investment value will vary.

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(10/2022)

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