

1199SEIU Benefit and Pension Funds

2024

YEAR IN REVIEW



## Letter from the Executive Director & CEO

Dear Trustees:

On behalf of our seven 1199SEIU Benefit and Pension Funds, I'm pleased to share this annual report with you.

In 2024, we delivered health, pension, and quality-of-life benefits to more than 450,000 members and their families—working and retired healthcare workers who care for others every single day. Staying true to our mission, we remained focused on what matters most: ensuring access to the benefits that support our members' health, dignity, and peace of mind.

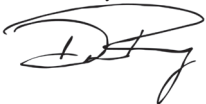
We managed \$2.5 billion in healthcare costs, and with the same care and diligence, stewarded \$17.8 billion across our three Pension Funds to support over 138,000 retirees and beneficiaries. Every dollar, every program, every decision was made with intention—to improve the health and lives of our members and keep their assets safe for the future.

In 2024, we continued to sharpen our approach. We leaned into our partnerships and lifestyle medicine programs, expanded our outreach and support efforts to members with chronic conditions, and kept listening to what our members need. Through initiatives like *Members' Voices* and *Health Is the Key*, we broadly shared real stories and real expert support, helping members feel seen, connected, and empowered.

Our nearly 1,500 Funds staff members worked together with dedication and heart, committed to helping our members navigate every stage of their health and wellness journey. And we couldn't do this work without you—our Trustees—who guide, challenge, and support us every step of the way.

Thank you for your partnership, your leadership, and your belief in what we do. I hope this report makes you as proud as I am of all that we've accomplished—together—in service of our members.

Sincerely,



Donna Rey, EdD  
Executive Director, 1199SEIU Benefit and Pension Funds  
CEO, 1199SEIU Funds Administrative Operations



## Members' Voices and Health Is the Key Raise the Bar and Reach Members



**All-time # of Views**  
**63,500+**



The *Members' Voices* video series continues to generate an extraordinary response from our 1199SEIU community. This series has become a powerful platform for sharing real stories from real members—individuals who have courageously lent their voices to encourage their peers by speaking openly about their personal health journeys. Since its launch in 2023, it has garnered the most views and listens across all our platform channels.



**All-time # of Streams**  
**32,000+**

*Health Is the Key* features our industry experts as guests on our podcast, which breaks down complex health topics in relatable, practical terms for our members and the community. These down-to-earth conversations empower listeners to take action through small, meaningful changes. In 2024, it completed its first season, surpassing all expectations and becoming a popular companion to our *Members' Voices* series.



# The Lives We Covered in 2024



*\*Includes 859 lives from the LPN Welfare Fund*

**Total Covered  
Lives**

**450,652\***

**337,037**

NBF/HCEPF Covered Lives

**43,436**

GNYBF/GNYPF Covered Lives

**69,320**

HCBF/HCPF Covered Lives

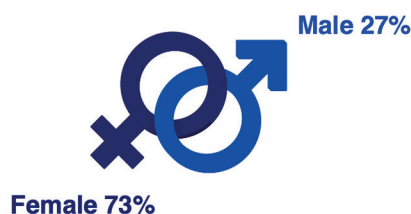
## The Members We Serve

Our members across the healthcare spectrum—hospitals, nursing homes and home care agencies—are a diverse group. With an average age of 47.8, our overall membership breaks out 73% female and 27% male, predominantly living in Brooklyn, the Bronx, Queens, Long Island and Upstate New York.

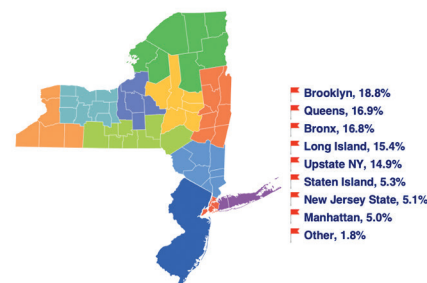
### Member 2024 Age, Gender and Geography



**Average age**



**Gender**



**Where we live**

### 1199SEIU National Benefit Fund (NBF)

NBF members are spread across the five boroughs and the tristate area, with an average age of 46.2 and a makeup of 71% female and 29% male.

### 1199SEIU Greater New York Benefit Fund (GNYBF)

GNYBF members also live throughout the tristate area, with the highest percentage on Long Island (22%), an average age of 51.5 and 75% female and 25% male.

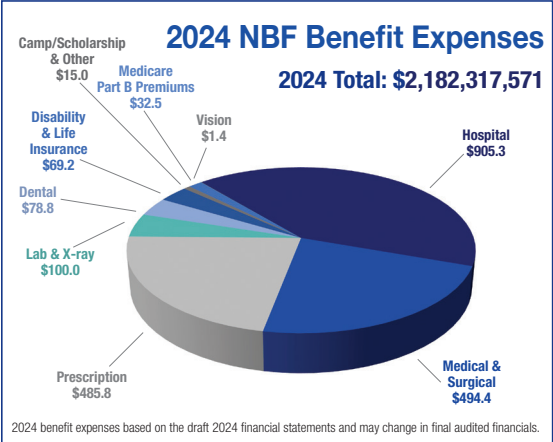
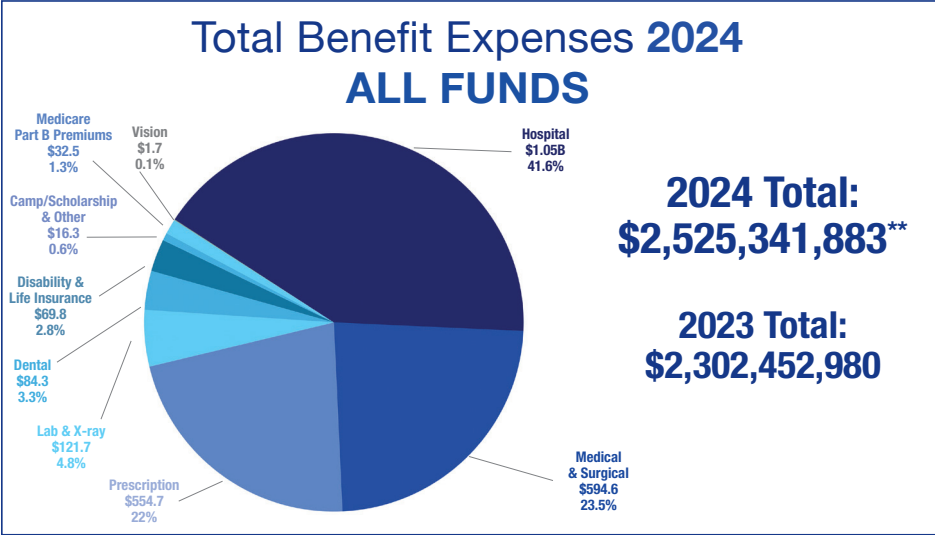
### 1199SEIU Home Care Benefit Fund (HCBF)

The majority of our HCBF members live in Brooklyn (40%), have an average age of 60.5 and are 95% female.

# Benefit Expenses in 2024

In 2024, the 1199SEIU National Benefit Fund (NBF), the 1199SEIU Greater New York Benefit Fund (GNYBF) and the 1199SEIU Home Care Benefit Fund (HCBF) together paid \$2.5 billion in benefits for our 359,084 members, retirees and their families. Our members paid virtually no premiums, no deductibles and no point-of-service costs for their healthcare.

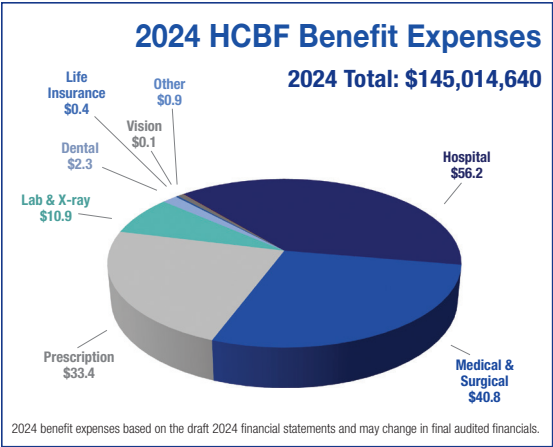
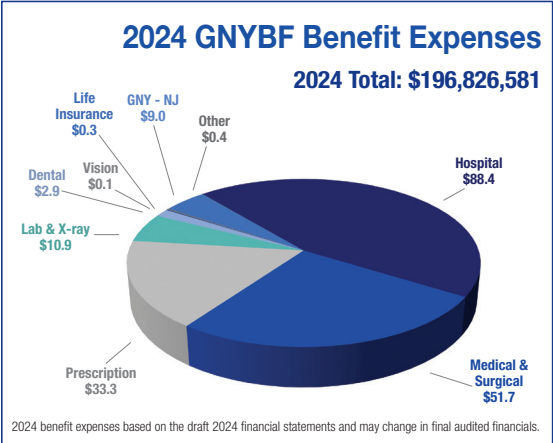
There has been a shift in the overall costs that we are paying as more members are taking GLP1s and more effective, but costly medications for other conditions. Prescription is now a larger percentage of the health spending pie. **In 2019, prescription was only 16.9% of the pie, and by 2024 it was 22%, and the actuaries are projecting this percentage to keep growing over the next few years.**



### Total Covered Lives for Benefit Funds in 2024\*\*

	NBF	GNYBF	HCBF	All Funds
Active Members	116,978	17,020	36,272	170,655*
Dependents	114,171	11,478	1,609	127,192**
Retirees	58,385	2,852	—	61,237
Total Lives	289,534	31,350	37,341	359,084

\* NBF includes Rochester members; GNYBF includes members employed in NJ.  
\*\* Total expenses include \$1.2M and Covered Lives Includes 859 NYC employees and family members who receive limited supplemental benefits from the LPN Welfare Fund.





# Care and Value Improvement Program

## PROGRAM SAVINGS, 2021–2026

# \$860M

Current projected  
across all Funds



## Staying on Track for Cost-Savings

Of course, part of our mission is to stretch employer contributions and Benefit Funds dollars, to keep members healthy with limited out-of-pocket costs.

Since 2004, the League and Union collective bargainers have mandated cost savings in the collective bargaining agreement, and every contract we work to achieve them. Because we administer all the Benefit Funds jointly, the Greater New York and Home Care Benefit Funds also benefit from the savings attributed to these programs.

In the current CBA period, the National Benefit Fund is projected to realize a total of **\$732M** in cost savings by 2026. In addition, the Greater New York Benefit Fund will realize a total of **\$73M** and the Home Care Benefit Fund will realize **\$55M** in cost-savings.

**NBF CBA Target:**  
**\$631M**

**NBF Current Projected:**  
**\$732M**

The GNY Benefit Fund will realize a total of **\$73M** and the Home Care Benefit Fund will realize **\$55M** in cost-savings.





# Our Healthy Focus

The chart below shows an increase in the number of members with pre-diabetes and diabetes from 2019 to 2024. One reason for that is because we have identified many new cases since expanding our reach through health fairs and the Primary Care for All campaign. More members are now seeing a primary care doctor than before and, as a result, are being diagnosed and treated.

More good news is that we are stabilizing those who are prediabetic before they progress to diabetes and helping those with uncontrolled diabetes bring it under control. Diabetes control has significantly improved—**rising from 57.9% in 2021 to 64.7% in 2024.**

**That’s 1,921 members who got their diabetes under control. This translates into \$2.8M of potential Benefit Funds savings.**

## Member Health Profile (Members, Spouses and Dependents 18 and Up)

1199SEIU Members 2019	1199SEIU Members 2024
29% Have Pre-Diabetes or Diabetes	35% Have Pre-Diabetes or Diabetes
37% Have Hypertension	37% Have Hypertension
N/A Have Obesity or Severe Obesity	43% Have Obesity or Severe Obesity



## Health Screenings and Early Detection Save Lives



Promoting health screenings, especially cancer screenings, is fundamental to our mission and work. It plays a crucial role in the early detection and prevention of potential serious health issues for our members.

In 2024, the Benefit Funds continued to expand outreach and targeting in our awareness campaigns, and cancer screening rates were up—especially colonoscopies. In 2020, 45.7% of members were on schedule with their colorectal cancer screening.

Now **54.2%** are on schedule.

The Benefit Funds also partnered with Northwell and Montefiore to reach out to members who were due for their colorectal cancer screenings. From this outreach, early screening led to the detection of 54 members who had polyps removed that could have led to cancer and one member who was actually diagnosed with cancer and therefore able to get treatment.





## Primary Care for All

Since 2022, when we kicked off our Primary Care for All campaign, the number of members engaged in primary care continues to grow. After several years of implementation, **87% of our members** (age 18 and older) have seen a primary care physician (PCP) in the last three years!

### Members 18+ Who Visited a PCP

Year	% with PCP
2019	85.7%
2020	86%
2021	86.5%
2022	86.6%
2023	87.2%
2024	87.4%

- Since 2023, the Benefit Funds have partnered with SBH Health System and the Pierre Toussaint Family Health Clinic to improve access to primary care.
- In 2023, 32% of the members who returned to care were diagnosed with type 2 diabetes or hypertension. In 2024, 27% of those who returned were diagnosed.
- In 2023, 55% of those diagnosed with type 2 diabetes were uncontrolled. Since then, 20% of these moved to controlled. This translates into **\$169,000 of Benefit Funds savings**.
- In 2024, 48% of those diagnosed with type 2 diabetes were uncontrolled. If these members were able to lower their A1C by three points, this would translate into **\$60,000** in savings. **In total, this is \$229,000 of potential savings.**
- In total, **1,034 members** who returned to care in 2023 and 2024 were diagnosed with type 2 diabetes or hypertension.

The increase from 85.7% to 87.4% translates into **2,900 more members** with a primary care provider relationship.

And **91% of children** up to age 18 have had a primary care visit.



# Supporting Our Members on Their Health Journeys—Our Expanded Wellness Approach

Our 1199SEIU Benefit Funds members and their families rely on us for their health benefits. Our Analytics staff, Chief and Deputy Chief Medical Officers, Wellness staff, social workers, Outreach Coordinators and Member Services representatives provide support in ways that commercial health plans simply cannot. Our ability to analyze our claims data and access clinical data has allowed us to expand our healthy living programs and support members on their journeys to make the greatest impact. More meaningfully, we are empowering members to take charge of their own health through initiatives such as our Healthy Living Resource Center, Primary Care for All and restructured health fairs, as well as strategic partnerships, which allow members to find the programs that are right for them.





# Meeting Our Members Where They Are

## Our Holistic Approach to Health Fairs

Connection to care and early identification of chronic disease can significantly improve health outcomes and lower healthcare costs. To that end, we reimagined our worksite health fairs with a holistic approach, integrating our programs into the health fairs and sending our Wellness and Outreach teams to conduct health education, clinical tests and healthy living promotion, and providing on-site referrals to programs, primary care physicians and other supports.

In 2024, we saw **3,557 members** at **41 health fairs**

- 1,497 of these members were newly diagnosed with pre-diabetes or diabetes, or had elevated blood pressure
- 52% visited their PCP within 90 days of diagnosis

## Anticipated Financial Impact

A delay in the onset of diabetes for just a small percentage of the 480 members newly diagnosed with pre-diabetes at health fairs, could result in \$100,000 of savings annually.



## Members Who Attended Health Fairs by Shifts in 2024

1199SEIU Benefit Funds and Union Staff (March) – 153  
1199SEIU Benefit Funds and Union Staff (April) – 123  
ArchCare at Mary Manning Walsh – 63  
ArchCare at Terence Cardinal Cooke Health Care Center – 89  
Beth Abraham Center for Rehabilitation and Nursing – 55  
BronxCare Health System – 97  
BronxCare Health System Fulton Division – 79  
Cabrini of Westchester – 67  
Clove Lakes Health Care and Rehabilitation Center – 80  
Cooperative Home Care Associates – 77  
Hebrew Home at Riverdale – 103  
Hopkins Center for Rehabilitation and Healthcare – 72  
Interfaith Medical Center – 105  
Jamaica Hospital Nursing Home – 64  
Montefiore Mount Vernon Hospital – 47  
Montefiore New Rochelle Hospital – 92  
Montefiore Weiler Hospital (Einstein Campus) – 113  
Mount Sinai West – 142  
Mount Sinai Queens – 140  
New Jewish Home (Manhattan) – 114  
New Jewish Home (Sarah Neuman) – 75  
New York Eye & Ear Infirmary of Mount Sinai – 77  
Northwell-Long Island Jewish Forest Hills – 115  
Northwell-Long Island Jewish Valley Stream – 96  
Northwell-Plainview Hospital – 101  
Northwell-South Shore University Hospital – 54  
Northwell-Staten Island University Hospital - North Campus – 74  
Northwell-Syosset Hospital – 70  
NYP Brooklyn Methodist Hospital – 70  
NYP Morgan Stanley Children's Hospital – 89  
NYP Queens – 113  
NYU Langone Perlmutter Cancer Center – 36  
NYU Langone Tisch Hospital – 136  
Parker Jewish Institute for Health Care & Rehabilitation – 87  
Plaza Rehab and Nursing Center – 55  
Richmond University Medical Center – 62  
St. John's Riverside Hospital – 89  
Sunnyside Community Services – 71  
The Grand Rehabilitation and Nursing at Great Neck – 50  
The Riverside Premier Rehab – 85  
Triboro Center Rehabilitation and Healing Center – 76



# Meeting Our Members Where They Are

## Virta Tackles Diabetes

In the spring of 2023, we informed members living with type 2 diabetes about a new partnership with Virta, a diabetes-reversal treatment program. This program is not for everyone, but for some members, it's very successful.

When I got the email about Virta from the Benefit Fund and read about it in the FYB magazine, I was struggling with my A1C and avoiding my doctor.

**Virta saved me.**

*Maria Steiper, Quality Coordinator at Good Samaritan Hospital*



In 2023 and 2024, 129 members engaged in the program. On average, members lost 9.7 pounds, reduced their body weight by 4.9%, and lowered their A1C by 0.857 points.

### Anticipated Financial Impact

Initial 2024 data indicates that Virta members' weight loss achieved could result in as much as \$160,000 in cumulative cost savings for the Benefit Funds.



*Christina Chechile, Lead X-ray Technician at Northwell Long Island Jewish lost 90 lbs. on WW.*

## The WeightWatchers® Experience

Our WeightWatchers program has been incredibly successful for thousands of members, who feel empowered and draw inspiration from our WW community. In 2024, we completed a research project with the CUNY Urban Food Policy Institute to test our success. The outcome of the research will be published in 2025 in a peer-reviewed journal.

WW Weight Loss Statistics	Number of Members	% Increase 2023 to 2024
Members who lost between 3% and 5% body weight	393	25.6%
Members who lost between 5% and 10% body weight	427	33.9%
Members who lost more than 10% body weight	309	91.9%
<b>Total participants who lost more than 3% body weight</b>	<b>1129</b>	<b>42.4%</b>

Members shared that tracking their food and activity, engaging with community, and receiving motivational communications were key factors in helping them reach their weight loss goals. However, they also noted ongoing challenges, including navigating cultural or traditional food habits, finding healthy and convenient alternatives, managing busy work schedules, and sustaining support at home.

### Anticipated Financial Impact

Research shows that, among members living with obesity (a BMI of 30+), every 5% reduction in BMI could yield up to 13.1% cost savings. Initial 2024 data indicates that WeightWatchers members' weight loss achieved could result in as much as **\$2.5 million in cost savings.**



# Meeting Our Members Where They Are

Bolstering our Healthy Living initiative, we continued to offer the wellness and whole-member programs we have always provided—years before they became the industry norm. In addition, members accessed our Healthy Living Resource Center for information on nutrition, mental wellness, fitness, heart health and fostering healthy relationships with their healthcare providers, as well as inspiration from fellow members and insights from experts.

Throughout 2024, we also focused on planning and preparing to expand our wellness offerings in 2025. These upcoming programs are designed to give members more personalized choices and include:

- **FlyteHealth**, already in our network, offering support for weight loss and overall health management
- A collaboration with **AdvantageCare Physicians** to enhance diabetes care for members seeing ACP doctors
- Expanded access to nutritionists through our **telehealth services with Teladoc**
- The addition of **Ochsner Digital Health** to our network, providing virtual support for managing diabetes and hypertension

Supporting Our Members' Health: Wellness Member Assistance Program		Supporting the Whole Member: Additional Programs	
Activity	Members Served in 2024	Program	Members Served in 2024
Onsite Worksite Workshops	541	Financial Wellness and Homebuyer Education (workshops and assistance)	1,214
Virtual Worksite Workshops	2,768	Online Financial Wellness Classes	874
Wellness Member Assistance Program Assistance	2,858	Citizenship Program	676 members 243 new citizens
Counseling and Referrals	2,575	Legal Clinic	557 (all by phone)

## The Impact of Our Programs

Healthcare is not one-size-fits-all, so we know that offering a variety of programs can have maximum impact on members' lives. Here is the overall impact of our multiple approaches.

	Members in 2023	Members in 2024	Total Members (2023 + 2024)	2023 Potential Projected Savings	2024 Potential Projected Savings	Cumulative Savings
PC 4 All	2,125	798	2,923	\$200,000 For 100 uncontrolled diabetes	\$60,000 For 40 uncontrolled diabetes (potential savings)  \$169,000 Actual savings from 2023 identified now controlled (24)	\$229,000 (potential and actual)
Virta	116	19	129	\$24,000 in 2023		\$160,000 Cumulative (actual) (33)
WW	5,107	1,467	6,574	\$1.3M in 2023		\$2.5M Jan 2023-Oct 2024 (actual) (725)
Health Fairs	2,862	3,557	6,419	\$100,00 3.5% of 465 averting progression to diabetes	\$100,00 3.5% of 480 averting progression to diabetes	\$200,00 3.5% of 945 averting (potential)

Total actual savings of \$2,829,000 through 2024



# Our Pension Funds

Our three Pension Funds, the 1199SEIU Health Care Employees Pension Fund (HCEPF), the 1199SEIU Greater New York Pension Fund (GNYPF) and the 1199SEIU Home Care Pension Fund (HCPF), support 138,279 members’ financial security in retirement. Eligible retirees receive a defined benefit pension—a set monthly payment that fewer than one in five U.S. workers can count on today.



## Pension Funds Snapshot 2024

	Health Care Employees Pension Fund	Greater New York Pension Fund	Home Care Pension Fund	Total All Pension Funds
Total Assets	\$16.1B	\$1.1B	\$564M	\$17.8B
Number of Retirees	91,392	14,908	31,979	138,279
Total Pension Benefits Paid	\$1.2B	\$92.4M	\$30.6M	\$1.3B

- The Health Care Employees Pension Fund remained in the “Green Zone” (not Endangered or Critical Status) for 2024.
- The Greater New York Pension Fund remained in “Critical Status” and is on track to emerge from Critical Status in line with the Rehabilitation Plan.
- The Home Care Pension Fund remained in the “Green Zone” for 2024; no further action needed to maintain this status at this time.

## 2024 Pension Asset Returns

The rate of returns in 2024 for each of the Pension Funds exceeded actuarial assumptions:

- Healthcare Employees Pension Fund = **7.94%** (assumed rate of 7.5%)
- Greater New York Pension Fund = **8.2%** (assumed rate of 7.0%)
- Home Care Pension Fund = **11.5%** (assumed rate of 7.0%)

*2024 pension assets and returns based on the draft 2024 financial statements and may change in final audited financials.*





# Serving Our Members

In 2024, we continued to support our members administratively by phone, email and in-person visits at the Funds. Our members rely on us to administer their benefits, pay claims, troubleshoot problems and provide resources that empower them to manage their health and improve their well-being. In 2024, we continued to provide that support through our everyday work, thoughtful benefit plans and innovative wellness programs. We also launched a number of initiatives to serve the whole person.



## Supporting Our Members

In 2024, calls and emails have decreased as a direct result of online functionality enhancements and automation of benefit reimbursements.

<b>Calls Answered</b>	<b>577.4K</b>
<b>Emails Answered</b>	<b>136.8K</b>
<b>Voicemails Answered</b>	<b>21.8K</b>
<b>Appointments Scheduled</b>	<b>1.1K</b>
<b>Claims Processed</b>	<b>5.1M</b>
<b>Walk-ins</b>	<b>51.5K</b>
<b>Worksite Visits</b>	<b>49.1K</b>

## Supporting Our Providers in Their Service to Our Members

Because supporting our providers is critical to the support of our members, we continued to make access easier and more efficient in 2024.

<b>Calls Answered</b>	<b>357.9K</b>
<b>Emails Answered</b>	<b>12.3K</b>
<b>Portal Transactions</b>	<b>5.7M</b>
<b>IVR Calls</b>	<b>339.5K</b>

## How MyAccount Supports Our Members

The Funds don't only support our members by phone, email or in-person. Each year, our members continue using the convenience of **MyAccount** to:

- Update personal information like address and contact details
- Enroll eligible dependents
- Find out the status of a medical claim
- View Explanation of Benefits (EOB) statements
- Request a new 1199SEIU Health Benefits ID card
- Enroll in the Maternal Health Program
- Give consent to share health data
- Submit a medical claim reimbursement
- Request a pension estimate
- Apply for their pension
- Register for benefits offered by the 1199SEIU Child Care Funds
- Find out about training benefits through the 1199SEIU Training and Employment Funds

### MyAccount Utilization Continues to Grow in 2024

Users **200K**

Logins **157K**

## The Top 5 Reasons Members and Retirees Used MyAccount in 2024

1. Viewed Medical Claims **93K**
2. Updated Address **85K**
3. Accessed Pension Check Information **32K**
4. Requested Pension Estimate **24K**
5. Requested 1099-R **21K**

# Our Funds' 2024 Trustees

## NATIONAL BENEFIT FUND

### Jacqueline Alleyne

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Camp and Scholarship Committee

### Yvonne Armstrong

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Appeals Committee, Audit Committee,  
Care and Value Improvement Committee,  
Camp and Scholarship Committee,  
Collections Committee,  
Executive Committee, Investment Committee

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### Nora Donohoe

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### Nadine Ferguson

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Northwell Health System

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and Rehabilitation

### Helen Schaub

1199SEIU United Healthcare Workers East

### Neal Schelberg

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Executive Committee, Investment Committee

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Sunnyside Community Services

### Veronica Turner

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NewYork-Presbyterian Hospital  
Executive Committee

### Daine Williams

1199SEIU United Healthcare Workers East

### Nadine Williamson

1199SEIU United Healthcare Workers East  
Executive Committee

### Keith Wolf

SBH Health System, Bronx

### Sui Ling Xu

1199SEIU United Healthcare Workers East  
Appeals Committee

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Care and Value Improvement Committee,  
Collections Committee,  
Executive Committee, Investment Committee,  
Retirement Committee

### Ilene Arroyo

The New Jewish Home  
Retirement Committee

### Austin Bender

NYU Langone Health

### Lisa Brown

1199SEIU United Healthcare Workers East

### Maxine Carrington

Northwell Health System  
Investment Committee

### Lucy Chen

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Audit Committee, Investment Committee

### Joseph Chinae

1199SEIU United Healthcare Workers East  
Care and Value Improvement Committee,  
Investment Committee,  
Retirement Committee

### Jeffrey Cohen

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Retirement Committee

### Roger Cumberbatch

1199SEIU United Healthcare Workers East  
Retirement Committee

### Adekemi Gray

1199SEIU United Healthcare Workers East

### George Gresham

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Executive Committee

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Care and Value Improvement Committee,  
Collections Committee,  
Cross Funds Joint Administrative Committee,  
Executive Committee, Investment Committee,  
Retirement Committee

### Sal LaVecchia

Mount Sinai Health System

### Marc Leff

Northwell Health System  
Retirement Committee

### Jason Limson

Northwell Health System

### Barbara Logan

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Care and Value Improvement Committee,  
Cross Funds Joint Administrative Committee,  
Investment Committee

### Patricia Marthone

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Retirement Committee

### James McGregor

1199SEIU United Healthcare Workers East  
Care and Value Improvement Committee

### Guy Mennonna

The Brooklyn Hospital Center

### Christene Nation-Jumpp

ArchCare

### Joyce Neil

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Care and Value Improvement Committee,  
Executive Committee, Investment Committee,  
Retirement Committee

### Robert Oliver, Jr.

League of Voluntary Hospitals and Homes  
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Maimonides Health

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Executive Committee, Investment Committee,  
Retirement Committee

### Janice Reyes

Montefiore Medical Center  
Retirement Committee

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