Welcome to the 2016 IBI Annual Forum

Expanding the Value Proposition for Workforce Health: Connecting all the Pieces

SAN FRANCISCO | FEBRUARY 15-17, 2016

The Westin St. Francis—San Francisco on Union Square, 335 Powell Street San Francisco, California 94102

About IBI

Founded in 1995, the Integrated Benefits Institute (IBI) is a national, nonprofit research and educational organization committed to helping business leaders and policymakers understand the business value of workforce health and recognize the competitive advantages of helping employees get and stay healthy. IBI is supported by more than 1,100 member companies representing over 20 million workers.

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Dear Forum Attendee:

Welcome to the 2016 IBI Annual Forum. We are pleased to host the Forum at the Westin St. Francis Hotel on Union Square in San Francisco. We hope you enjoy our beautiful city.

Demonstrating the value of workforce health to senior leaders has never been more important than it is today. This year’s Forum will address this issue, with particular focus on how all the different initiatives fit together in a more holistic approach to workforce health.

We are especially fortunate to have such a wide variety of speakers joining us this year to address these critical issues. We have emphasized practical solutions that can be taken back to your offices and implemented, while also exploring innovative solutions that are pushing the envelope and helping the field evolve.

We’ve also expanded the capability of our Forum mobile app, so be sure to download it. After downloading the app by searching “IBI Forum” on the Apple Store or Google Play, attendees can personalize their session schedule, download presentation materials, and exchange contact information without having to walk around squinting at name tags.

In 2016, IBI is expanding ways to reach and engage with our members and want the Forum to serve as a launching pad for our additional member initiatives. In addition to the Forum, members can look forward to seeing regional conferences, webinars with leading professionals, diverse case studies, industry focused benchmarking groups and research driven by member needs.

We hope you enjoy the Forum to the fullest. I know it will create opportunities for you to learn, share, and grow in our common interest to improve our businesses and our workers’ lives.

Regards,

Thomas Parry, Ph.D.
President
Integrated Benefits Institute
IBI Board of Directors

January 2016

Abbvie
Represented by Robin J. Kahn
Senior Manager, Employer Channel Marketing

Aetna, Inc.
Represented by Richard Feifer, MD, MPH, FACP
Chief Medical Officer, National Accounts

Anthem, Inc.
Represented by Tracie Foster
Director, Product Management and Business Development

Aon Hewitt
Represented by Sander VanderWerf
Leader, Vice President

Bank of America Corporation
Represented by Jim Huffman
Sr. V.P. - Global Benefits

Bristol-Myers Squibb
Represented by Christopher M. Dezii, RN, MBA, CPHQ
Director, Healthcare Quality and Performance Measures

Buck Consultants, a Xerox Company
Represented by Bruce Sherman
Medical Director, Population Health Mgmt Health Exchange Solutions

CarMax, Inc.
Represented by Janet Bruington
Director, Benefits

Comcast Corporation
Represented by Scott Daniels
Director of Disability

Health Care Service Corporation
Represented by Kevin M. Cassidy
VP National Major Accounts

IBM Corporation
Represented by Lydia Boyd Campbell, MD, MPH
Wellbeing Director, IBM Americas, HR Integrated Health Services

Intermountain Healthcare
Represented by Mark Tenney
Director of Human Resources

IBI's Board of Directors includes the following leaders in health and productivity.

Liberty Mutual Insurance Company
Represented by Dan Lyons
Vice President and Manager-National Accounts

Mercer-Trion
Represented by Phil Lacy
Health & Productivity Practice Leader

Novo Nordisk
Represented by Kevin Mead
Director, Strategic Accounts-Employers

Pfizer, Inc.
Represented by William S. Stafford
Director, Employers

Pinnacle Assurance
Represented by Karyn Gonzales
VP of Medical Operations & Healthcare Strategy

Progressive Casualty Insurance Company
Represented by Tim Kowalski, MD, FCCP, CPE
Chief Medical Officer

Prudential Financial, Inc.
Represented by Eric Hamilton
VP Product & Process, Small Business Segment

Reliance Standard/Matrix Absence Management
Represented by Tim Suchecki
National Practice Leader

Sanofi
Represented by Glenn Beers
Sr. Employer Account Executive

Sedgwick Claims Management Services, Inc.
Represented by Denise Fleury
SVP, Disability and Absence Management

Standard Insurance Company
Represented by David Payne
Vice President, Contact Center

Sun Life Financial
Represented by Alexandra Dumont
AVP, Product Management

Target Corporation
Represented by Michelle Steen
Benefits Analyst Manager.

Teladoc
Represented by Liz Hietala
Vice President, Industry and Consultant Relations

The Goodyear Tire & Rubber Company
Represented by J. Brent Pawlecki, MD, MMM
Chief Health Officer

The Hartford
Represented by Michael J. Dunst
AVP, National Practice Leader

The Home Depot
Represented by Yolanda Harper, RN, MBA/HCM
Sr. Manager, Medical & Health Management Department

UnitedHealthcare
Represented by Donald Potter
Vice President, Client Relations

UPMC WorkPartners
Represented by David M. Weir
President, UPMC WorkPartners and Commercial Products

USAA
Represented by Asa Waterman, FSA, EA, CFA
Total Reward, Human Resources

Willis Towers Watson
Represented by Mary Tavarozzi
Towers Watson North America Practice Leader - Absence and Disability Management

Zurich
Represented by John Miskel
Head of CLP NA
## Schedule of Events

### Monday, February 15, 2016

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
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<tbody>
<tr>
<td>11:30am</td>
<td>Registration Opens</td>
<td>Mezzanine Level Registration</td>
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<tr>
<td>1:30pm – 2:30pm</td>
<td><strong>Pre-conference: Overcoming FMLA &amp; ADA Challenges: A Case Study in Absenteeism Improvement</strong></td>
<td>Elizabethan Room A</td>
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<td></td>
<td>• Matt Morris, J.D., Vice President of FMLASource, ComPsych</td>
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<td>• Marjory Robertson, J.D., AVP &amp; Senior Counsel, Sun Life Financial</td>
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<td>The Family and Medical Leave Act continues to undergo hundreds of changes per year, while the Americans with Disabilities Act is now called an “inadvertent leave act” since it can have a similar impact upon absences and productivity. In this informative session, hear from attorney and FMLA/ADA expert Matt Morris of ComPsych on the latest changes in both FMLA and ADA, along with strategies for staying compliant and reducing the impact of both acts upon your organization. In addition, Morris and Marjory Robertson of Sun Life Financial will present a comprehensive case study, featuring Bel Brands, on challenges and solutions related to: multiple decision makers affecting consistency and compliance in FMLA/ADA determinations, intermittent leave impacting scheduling, and overall absences affecting the company’s operations.</td>
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<td>1:30pm – 2:30pm</td>
<td><strong>Pre-conference: Health in Action: Creating a Culture of Health at Large Self-Insured Employer</strong></td>
<td>Elizabethan Room B</td>
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<td>• Michael Sokol, M.D., Chief Wellness Officer, Sanofi</td>
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<td>In 2014, Sanofi embarked on a re-launch of its internal Health and Wellness Initiative, known as Health in Action. This presentation will provide an overview of the initiative and discuss the details of how to build a culture of health at a large, self-insured employer, including development of the strategy, objectives, elements of its approach, and results. It will also touch on other key themes, including communication and promotion, education and engagement, linkages with health benefit design, and an incentive structure that rewards participants for demonstrating healthy behaviors.</td>
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<td>1:30pm – 2:30pm</td>
<td><strong>Pre-conference: Getting Started on a Proven Path to Absence Management Success</strong></td>
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<td>• Gene Lanzoni, Assistant Vice President, Market &amp; Customer Insights, Guardian Life Insurance</td>
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<td>• Stephen Coffman, Senior Life &amp; Disability Practice Leader, Guardian Life Insurance</td>
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<td>• Suzanne Dennis, Manager of HR Services, Joerns Recover Care</td>
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<td>A majority of employers have already begun their journey to better their absence management. Yet, according to Guardian’s 2014 Absence Management Index &amp; Study, most employers are very early-on in their efforts. A majority of U.S. employers—especially those with fewer than 1,000 workers—say they need help in developing and implementing a strategy that will set them on the right course. This workshop will draw upon Guardian’s latest research and lay out a roadmap for getting started including best practices of those who have experienced above-average success with their absence and return-to-work programs to date.</td>
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<td>1:30pm – 4:00pm</td>
<td><strong>Relaxation Station &amp; Massage Therapy sponsored by ShapeUp</strong></td>
<td>Borgia Room</td>
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<td>2:40pm – 3:00pm</td>
<td><strong>Forum Begins</strong></td>
<td>Grand Ballroom</td>
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<td>Welcome and opening remarks by IBI President, Dr. Thomas Parry.</td>
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<td>3:00pm – 4:00pm</td>
<td><strong>Plenary Session: Finding the Value in Health — Results from IBI’s Newest Research with 435 CFO’s</strong>&lt;br&gt;• Brian Gifford, Ph.D., Director, Research and Measurement, Integrated Benefits Institute&lt;br&gt;• Gregg Hammann, COO, Sedgwick CMS&lt;br&gt;• Gary Zyla, CFO, AssetMark&lt;br&gt;Chief financial officers are responsible for ensuring that a company’s financial resources further its business strategy. Four times over the past decade and a half, the Integrated Benefits Institute (IBI) has surveyed CFOs and other senior finance executives about how employers invest in the health of their workers and the expected returns from their portfolio of health benefits. This session will discuss the findings of IBI’s fourth CFO Survey and answer the overarching question: Do benefits strategies such as cost-sharing with employees, investment in health promotion efforts, value-based benefits, specialty pharmaceutical coverage and use of private healthcare exchanges reflect priorities other than simply managing costs?</td>
<td>Grand Ballroom</td>
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<td>4:00pm – 4:20pm</td>
<td>Refreshment Break</td>
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<td>4:20pm – 5:20pm</td>
<td><strong>Plenary Session: Bringing Health to the Topline: Linking Health to Business Metrics</strong>&lt;br&gt;• Thomas Parry, Ph.D., President, Integrated Benefits Institute&lt;br&gt;• Wayne Burton, M.D., Global Corporate Medical Director, American Express&lt;br&gt;• Ben Hoffman, M.D., Chief Medical Officer, Global Health Services, General Electric&lt;br&gt;• Brent Pawlecki, M.D., Chief Medical Officer, Goodyear Tire &amp; Rubber&lt;br&gt;• Michael Sokol, M.D., Chief Wellness Officer, Sanofi&lt;br&gt;American Express is a leader in managing workforce health, wellbeing and productivity. However, as a company where “customer service is in the DNA,” AMEX has gone beyond managing the total cost of health and addressed the fundamental question, “How does the health of our workforce influence the performance of our business?” Dr. Wayne Burton, AMEX Medical Director, will discuss the evolution of AMEX’s health and productivity programs and address how the company is linking human capital investment to key business performance metrics. Following Dr. Burton’s presentation, IBI’s Dr. Thomas Parry will moderate a panel on the topic of linking health and business performance with representatives from General Electric, Sanofi and Goodyear Tire and Rubber Company.</td>
<td>Grand Ballroom</td>
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<td>5:20pm – 5:30pm</td>
<td>Meeting of IBI Members</td>
<td>Grand Ballroom</td>
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<td>5:30pm – 7:30pm</td>
<td><strong>Welcome Reception</strong>&lt;br&gt;Enjoy a sweeping view of San Francisco as we come together to network over cocktails and appetizers.</td>
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<td>7:00am</td>
<td>Breakfast sponsored by Omada Health</td>
<td>Grand Ballroom</td>
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<td>8:00am – 8:10am</td>
<td><strong>Opening remarks by Rich Feifer, M.D., IBI Board Chair</strong></td>
<td>Grand Ballroom</td>
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<td>8:10am – 8:30am</td>
<td><strong>Enterprise Health Management and Business Performance Award Ceremony</strong> Presented by IBI, sponsored by Castlight Health.</td>
<td>Grand Ballroom</td>
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<td>8:30am – 9:30am</td>
<td><strong>Plenary Session: Establishing Accountability for Lost Work Days and Job Loss: Public and Private Sector Perspectives</strong></td>
<td>Grand Ballroom</td>
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<td>• Yonatan Ben-Shalom, Ph.D., Senior Researcher, Mathematica Policy Research</td>
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<td>• Jennifer Christian, M.D., President and Chief Medical Officer, Webility</td>
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<td>• Jane Ryan, RTW Section Head, Mayo Clinic</td>
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<td>• Bruce Sherman, M.D., Medical Director, Employers Health Coalition</td>
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<td>Each year, millions of Americans lose their jobs or leave the workforce because their ability to work has been disrupted by a medical condition. All parties theoretically stand to benefit by reducing job loss. Employers could retain experienced workers and reduce replacement costs and productivity losses, and possibly their workers’ compensation and private disability insurance premiums. Workers could maintain their standard of living and avoid dependency on SSDI, Medicare, and other federal and state programs. In this session, panelists will provide public and private sector perspectives.</td>
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<td>9:30am – 9:50am</td>
<td><strong>Refreshment Break</strong></td>
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<td>9:50am – 10:50am</td>
<td><strong>Plenary Session: Behavioral Health and its Impact on Productivity and the Workplace</strong></td>
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<td>• Fikry Isaac, M.D., Chief Medical Officer, Health and Wellness Solutions, Johnson &amp; Johnson</td>
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<td>• Robert Carr, M.D., Director, Executive Master’s Program in Health Systems Administration, Georgetown University</td>
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<td>• Patricia Purdy, Vice President of Global Employer Solutions, Pacific Resources</td>
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<td>• Kimberly George, Senior Vice President, Corporate Development, M&amp;A, and Healthcare, Sedgwick</td>
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<td>Mental health conditions in the workplace cost US employers $80-100 billion in medical expenses and productivity losses annually. The emotional and psychological impacts on employees, colleagues, family members, and the community are just as important, if not more so; yet are far more difficult to address. During this panel, academics, mental health experts, and leading national employers will discuss defining the challenges of behavioral health in the workplace, identifying ways to build strong behavioral health support programs, and building corporate cultures that achieve healthy, sustainable individual and organizational performance through the optimization of behavioral health and wellbeing.</td>
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<td>10:30am – 4:00pm</td>
<td><strong>Relaxation Station &amp; Massage Therapy sponsored by ShapeUp</strong></td>
<td>Borgia Room</td>
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<td>10:50am – 11:10am</td>
<td><strong>Break</strong></td>
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<td>11:10am – 12:10pm</td>
<td><strong>Workshop A: Tackling Depression—The State of Tennessee’s Be Well at Work Program Approach</strong></td>
<td>Elizabethan Room A</td>
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<td>• Debra Lerner, Ph.D., Director, Program on Health, Work and Productivity, Tufts Medical Center</td>
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<td>• John Allen, Director, Behavioral Health Services, Tennessee Dept. of Finance and Administration</td>
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<td>Since 2004, a series of studies have been testing a novel telephonic program for employed adults with depression. The Be Well at Work (BWAW) Program is intended to provide accessible, private services coordinated with medical, psychiatric, and behavioral care. The program involves the assessment of adaptive challenges present at work and barriers to effective functioning as well as the use of tailored strategies to address these issues. In this session, the State of Tennessee will share the results of implementing BWAW in their employee health insurance plan to reduce healthcare expenditures and improve depression outcomes for employees.</td>
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<td>11:10am – 12:10pm</td>
<td><strong>Workshop B: Employee Wellness: It’s Not Just Physical, It’s Financial</strong></td>
<td>Elizabethan Room B</td>
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<td>• Richard Dalton, EVP, Chief Operating Officer, CoBiz Insurance</td>
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<td>• Andrew Kallestad, EVP, Employee Benefits, CoBiz Insurance</td>
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<td>• Eric Reisenwitz, SVP, Head of Group Protection Product &amp; Operations, Lincoln Financial Group</td>
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<td>Employee’s financial wellness is a crucial component for employers to achieve the best possible business results. During this session, presenters will review data supporting the link between group benefits and financial wellness from Lincoln Financial’s 2015 report — Measuring Optimism, Outlook, and Direction of America on Employee Benefits. Presenters will share data and insights on employees' views regarding financial security and group benefits.</td>
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<td>11:10am – 12:10pm</td>
<td><strong>Workshop C: Medical Decision Making: Impacts beyond Medical Risk</strong></td>
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<td>• Craig Kurtzweil, Senior Vice President, Analytic Innovations, UnitedHealth Group</td>
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<td>• Amy Green, Senior Coordinator, Benefits and TMS Business Processes, CEBS, Whole Foods Market</td>
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<td>• Randy Ford, Vice President, Product and Service Solutions, Unum – National Client Group</td>
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<td>UnitedHealth Group, Unum, and Whole Foods discuss the importance of using medical, disability, and productivity data to show how medical decision making can have an impact well beyond medical risk. This session will discuss the benefits of an integrated disability referral program via improving medical decision making, lowering disability exposure, and yielding higher productivity and profitability.</td>
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<td>11:10am – 12:10pm</td>
<td><strong>Workshop D: A Report from the Front Lines of Mindfulness-Based Programs: Four Years’ of Data from More than 100 Employers</strong></td>
<td>Elizabethan Room D</td>
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<td>• Ruth Wolever, Ph.D., Chief Scientific Officer, eMindful</td>
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<td>• Julie-Ann Poll, Business Project Program Sr. Manager, Aetna Inc.</td>
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<td>• Cheryl Jones, Wellness Program Strategy Lead, Aetna Inc.</td>
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<td>Among the most innovative developments in wellness today is the application of evidence-based mindfulness training to modifiable health cost drivers such as stress, metabolic disorder, smoking, diabetes, and chronic pain. This session will offer data and a case study showing how live, online mindfulness programs focused on resiliency and obesity management are bringing results to employees and their employers.</td>
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<td>11:10am – 12:10pm</td>
<td><strong>Workshop E: Tying Diabetes Prevention Back to Productivity</strong></td>
<td>Georgian Room</td>
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<td>• Alexandra Dumont, AVP Product Development, Sun Life Financial</td>
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<td>• Sunil Koliwad, M.D., Ph.D., President of the American Diabetes Association San Francisco Bay Area Community Leadership Board, American Diabetes Association; Assistant Professor, Diabetes Center and Department of Medicine at the University of California San Francisco</td>
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<td>• Dan Roach, Manager of Worker’s Compensation, Industrial Safety, and Road to Fitness, San Francisco Municipal Transportation Agency</td>
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<td>• Kim Jinnett, Ph.D, Executive Vice President, Integrated Benefits Institute</td>
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<td>Skyrocketing Type 2 diabetes diagnoses in the past 10 years illustrate how poor health and postponement of medical care are becoming more prevalent trends in the United States. This session will convene experts to discuss the effects of diabetes and related health risks from an employer perspective, as well as broader workplace health management strategies around diabetes prevention.</td>
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<td>12:10pm – 1:40pm</td>
<td>Lunch and networking break sponsored by Cigna</td>
<td>California Room</td>
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<td>Join attendees in the California Room for a delicious lunch.</td>
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<td>1:40pm – 2:40pm</td>
<td><strong>Workshop A: Telehealth at the Forefront of Healthcare Delivery</strong></td>
<td>Elizabethan Room A</td>
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<td>• Dawn Milligan, Director, Health and Welfare Operations, Reynolds American</td>
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<td>• Nirmal Patel, M.D., VP, Chief Medical Information Officer, Teladoc</td>
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<td>Teladoc partnered with Reynolds American over a 12 month period to explore telemedicine as a care option. Telehealth is the most rapidly growing sector in the health care industry and successfully facilitates the treatment of patients without unnecessary visits to the ER or urgent care clinics. Speakers will discuss the value of telehealth as a care option for increased employee engagement, productivity savings, and employee satisfaction. This presentation will address the key elements of an effective deployment and engagement strategy to achieve maximum adoption and impact.</td>
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<td>1:40pm – 2:40pm</td>
<td><strong>Workshop B: Working with Breast Cancer</strong></td>
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<td>- Lynn Zornakis, Former Managing Director of Health Strategy and Resources (Retired), Delta Airlines</td>
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<td>- Rebecca Nellis, Chief Mission Officer, Cancer and Careers</td>
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<td>The 2014 Harris Poll Survey analyzed attitudes and opinions surrounding breast cancer in the workplace from the perspectives of employers, healthcare professionals, and women with breast cancer. The survey revealed that the majority of working women with breast cancer feel that working aids their recovery, a view that was also echoed by virtually all healthcare professionals. Delta Airlines and Cancer and Careers representatives will discuss supportive measures and benefits, workforce strategies, and alternative work arrangements employers can practice to support their employees with breast cancer who desire to remain in the workplace.</td>
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<td>1:40pm – 2:40pm</td>
<td><strong>Workshop C: A Well–Rounded Approach to Foster Wellbeing</strong></td>
<td>Elizabethan Room C</td>
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<td>- Kristin Tugman, Ph.D., VP, Health &amp; Productivity Analytics and Consulting Practice</td>
<td>Group Insurance, Prudential</td>
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<td>- Tonyia Ragland-Davis, Corporate Disability Manager &amp; MDMS Manager, Michelin North America, Inc.</td>
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<td>Employers are in a unique position to strongly influence overall wellbeing by addressing an employee’s wellbeing through company culture and relevant programs. In this session, panelists will share strategies for creating a healthy sense of wellbeing in the workplace. Speakers will discuss employee engagement challenges and the steps taken to create an environment that fosters workplace health and how that has translated into improved overall wellbeing, engagement, and productivity.</td>
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<td>1:40pm – 2:40pm</td>
<td><strong>Workshop D: Mitigating the Impact of Absence on 24/7 Employers</strong></td>
<td>Elizabethan Room D</td>
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<td>- Michelle Jackson, AVP Health &amp; Productivity, Unum</td>
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<td>- Lisa Trepanier, Director – Global Mobility &amp; HR Administration, Bemis Company, Inc.</td>
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<td>Unplanned absences have a detrimental impact on all industries, though for some employers the impact goes beyond the direct and indirect costs. Employers with operations requiring round-the-clock staffing often struggle with the impact of unplanned or intermittent absences on shift coverage, service delivery and industry regulatory requirements. In this session, speakers will showcase strategies utilized to meet the challenges of various 24/7 operations and how to implement a successful return-to-work program. The successful strategy utilized an approach to analyze extensive leave and claim data, develop targeted return-to-work strategies, coordinate with vendor clinical and vocational resources and establish collaborations with on-site employer resources to develop workforce solutions that reduced the impact of unplanned absences.</td>
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<td>1:40pm – 2:40pm</td>
<td><strong>Workshop E: Improving Health and Outcomes through Integrated Health Promotion, Health Protection Initiatives, and Value-based Insurance Design</strong></td>
<td>Georgian Room</td>
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<td>- Edyta Domain, Director of Operation, Live Well Work Well, Dartmouth Hitchcock</td>
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<td>In this session, Dartmouth Hitchcock will share their approach to promoting and sustaining employee health. This presentation will outline Dartmouth Hitchcock’s comprehensive Total Worker Health Program and how it was used to leverage synergy and innovation, reduce lifestyle risks, manage chronic conditions, engage employees in health promotion programs, and directly integrate into their value-based insurance design.</td>
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<tr>
<td>2:40pm – 3:00pm</td>
<td><strong>Refreshment Break sponsored by HealthSCOPE Benefits</strong></td>
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<tr>
<td>3:00pm – 4:00pm</td>
<td><strong>Workshop A: Sleep Apnea Intervention: Reversing the Risk of Fatigue and Sleeplessness</strong></td>
<td>Elizabethan Room A</td>
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<td>- Steven Serra, M.D., Senior Medical Director, Aetna, Inc.</td>
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<td>- Tom Pela, Director of Health &amp; Wellness, Quest Diagnostics</td>
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<td>Noticing the risks posed by fatigue and sleeplessness, Quest Diagnostics partnered with Aetna to implement a sleep apnea screening program in 2014. Aetna and Quest Diagnostics developed a program combining evidence-based medicine and sleep assessment results to identify high-risk individuals for early intervention. This session will review national and employer-level costs, post-program impact, and productivity assessments from 2014 and 2015 while describing sleep apnea, its relationship to obesity, and its public health and workplace impact.</td>
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**Schedule of Events**

2016 IBI Annual Forum
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<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
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<tbody>
<tr>
<td>3:00pm – 4:00pm</td>
<td><strong>Workshop B: Why the Workplace is the Right Place to Cultivate Health Habits</strong></td>
<td>Elizabethan Room B</td>
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<tr>
<td></td>
<td>• Wendy Werve, Chief Marketing Officer, Virgin Pulse</td>
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<td>• Jennifer Benz, CEO, Benz Communications</td>
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<td>• Susan Piglia, Assistant Vice President, Corporate Wellness, Ochsner Health System</td>
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<td>• Laurie Indelicato, Wellness Coach, Ultimate Software</td>
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<td>Virgin Pulse, Benz Communications, Oshner Health System, and Ultimate Software will highlight the importance of wellbeing programs in making the workplace a great place to form and build on healthy habits and why doing so is critical to a company’s success. HR practitioners and industry experts will share first-hand examples of how their companies are putting their employees first and the benefits they are seeing as a result.</td>
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<tr>
<td>3:00pm – 4:00pm</td>
<td><strong>Workshop C: Best Practices of Absence Management and Regulatory Compliance</strong></td>
<td>Elizabethan Room C</td>
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<td>• Kimberly Mashburn, Disability, Absence &amp; Wellness Sales Consultant, The Hartford</td>
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<td>• Paulette Wright, Director of Employee Population Health &amp; Pension Strategies, Hackensack University Medical Center</td>
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<td>• Agnes Nines, Practice Leader, Absence Management, Arthur J. Gallagher &amp; Co.</td>
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<td>Managing employee absence in a compliant manner is becoming more challenging every day. Even with diverse work populations, there are practical methods that can be utilized to develop employee-centric strategies focused on addressing absence, worker safety and leave and ADA administration. Highlighting findings from the recently published IBI Employer Case Profile on Hackensack UMC, The Hartford, and Gallagher will share best practices that are delivering positive results in absence management compliance, health coaching, and stay-at-work and return-to-work programs. Further, they will discuss the measurement efforts they are undertaking in the development of sound productivity reporting metrics.</td>
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<tr>
<td>3:00pm – 4:00pm</td>
<td><strong>Workshop D: Steering Through Paid Sick Leave Administration at Tesla</strong></td>
<td>Elizabethan Room D</td>
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<td>• Sander VanderWerf, Vice President, Aon Hewitt</td>
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<td>• Rachel Arnedt, J.D., Vice President—Legal, Aon Hewitt</td>
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<td>• Janelle Tucker, Benefits Analyst, Tesla Motors</td>
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<td>While President Obama’s paid sick leave initiative has stalled in Congress, momentum is increasing in the states and municipalities. Paid sick leave laws are passing on the state and local levels at a swift pace. Tesla, a forerunner of innovative technology, was challenged to re-evaluate absence and benefit plans, payroll capabilities and current policies to ensure benefit plans were harmonized and compliant with regulatory requirements. This presentation will include an overview of Tesla’s approach to administer paid sick leave. Alternatives will be described and the challenges and opportunities of utilizing different strategies will be presented. The presentation will also include proactive and analytical strategies Tesla is utilizing to enhance benefit offerings and assess the needs of their workforce.</td>
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<td>3:00pm – 4:00pm</td>
<td><strong>Workshop E: A New View on Absence: Thinking like an Employee to Reduce Leaves</strong></td>
<td>Georgian Room</td>
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<td>• Deborah LaBonar, Ph.D., Senior Director, Absence Analytics, Aon Hewitt</td>
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<td>• Christine Hinnerichs, PHR, Absence Management/Compliance Advisor, American Red Cross-West Division</td>
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<td>By partnering with union and local leadership, Aon Hewitt and a health services employer with more than 23,000 workers reduced Leave of Absence incidence and duration at a 500+ employee location. In this session, presenters will explain how identifying key issues like low morale and high absenteeism allowed the organization to reduce the workdays lost due to Leave of Absence by 19% in year one and 36% in the second year following program intervention. Presenters will discuss how to use benchmark data to drive insight, focus intervention efforts, and build business cases to support organizational change.</td>
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<td>4:00pm – 4:20pm</td>
<td>Refreshment Break</td>
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<td>Time</td>
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<tr>
<td>4:20pm – 5:20pm</td>
<td>Plenary Session: Systemic Problems of Opioid Abuse</td>
<td>Grand Ballroom</td>
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<td>• Teresa Bartlett, M.D., SVP, Medical Director, Sedgwick</td>
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<td>• Roman Kownacki, M.D., Medical Director, Regional Occupational Health, Kaiser Permanente</td>
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<td>• Sameer Awsare, M.D., Assistant Medical Director, Kaiser Permanente</td>
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<td>The misuse and abuse of prescribed painkillers in the US has been an escalating problem for over a decade. This session will focus on how Kaiser and Sedgwick identified systemic problems of patient misuse and physician overprescribing of opioid medications for their employees or dependents. Presenters will discuss recommended practices for successful employer opioid management programs and the importance of data and metrics for managing non-occupational and occupational programs.</td>
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<tr>
<td>5:30pm – 7:00pm</td>
<td>Reception for Employer Attendees</td>
<td>Victor’s</td>
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<td>NOTE: This event is open to employer attendees and invited staff from our scholarship sponsors—Abbvie, Aetna, Novo Nordisk, The Hartford, RSLI, Sun Life Financial, Pacific Resources, and Willis Towers Watson.</td>
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For the rest of the evening, attendees have free time to schedule meetings or explore San Francisco.

### Wednesday, February 17, 2016

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<tr>
<th>Time</th>
<th>Activity</th>
<th>Location</th>
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<tr>
<td>7:15am – 8:15am</td>
<td>Breakfast sponsored by Liberty Mutual</td>
<td>Grand Ballroom</td>
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<td>This morning, attendees will go right to workshops after breakfast. We will come together as a group for a final plenary session after these workshops.</td>
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<tr>
<td>8:15am – 9:15am</td>
<td>Workshop A: An Integrated Approach: A Biometric, Behavioral and Cultural Well – Being Program</td>
<td>Elizabethan Room A</td>
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<td>• Jill Fragoso, Director, Employee Health and Wellness, Texas Children’s Hospital</td>
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<td></td>
<td>• Julie Griffith, Manager, Employee Medical Clinic and Wellness, Texas Children’s Hospital</td>
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<td>• Leroy Thomas, Director, Central Business Office, Texas Children’s Pediatrics</td>
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<td>In this session, Texas Children’s Hospital will show how a novel and easy-to-adopt, lifestyle-based wellbeing program achieved transformational biometric, behavioral and cultural impacts. This multi-faceted, six-month program included personalized around-the-clock health coaching sessions, group education, worksite health engineering tactics, leadership, and peer support mechanisms to create a healthy, happy, and high-performing workforce.</td>
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<tr>
<td>8:15am – 9:15am</td>
<td>Workshop B: A Major Employer Integrates Benefits to Better Support Behavioral Health of Its Workforce</td>
<td>Elizabethan Room B</td>
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<td>• Jim West, Manager of Employee Life Services (Retired), Michelin North America, Inc.</td>
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<td>• Rich Paul, SVP, Employer Strategy &amp; Development, Beacon Health Options</td>
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<td>• Melanie DuPon, Account Executive, Beacon Health Options</td>
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<td>The good health and wellbeing of its workforce is an employer’s most valuable asset. Across the US, employers are increasingly challenged to promote wellness and Employee Assistance Programs to engage employees and assist them in fulfilling their potential. Michelin partnered with Beacon Health Options to create a comprehensive behavioral health services program to fully support Michelin’s workforce. This presentation focuses on how Michelin Employee Life Services has achieved true program integration across benefits while increasing overall program utilization, improving outcomes, and achieving a positive return on investment.</td>
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### Workshop C: From Patient to Productivity — Using and Measuring the Effectiveness of Guidelines in the Clinical Environment

- Steve Wiesner, M.D., Chief, Occupational Health Department, Kaiser Permanente East Bay Medical Center, The Permanente Medical Group, Inc.
- Joe Guerriero, Sr. Vice President, The Reed Group, Ltd.
- Martha Garcia, Senior Program Manager, Kaiser Permanente

Using evidence-based guidelines accompanied with a robust analytic framework, Kaiser and The Reed Group developed a new protocol designed to assist physicians in helping their patients work productively, safely and quickly. This session will focus on the four best practices aimed at setting up a data-driven approach for return to work and treatment guidelines in a clinical environment.

### Workshop D: Local Government Increases Use of and Access to Benefits without Having to Cost Shift

- Kim Stroud, Division Manager, Manatee County Government, Florida
- Rodney Barnes, Director of HR, Manatee County Government, Florida

Since 2009, Manatee County Government has maintained remarkable health and pharmacy engagement as a result of the YourChoice Health Plan. Manatee County Government succeeded without having to shift costs to employees through a CDHP or a reduction in benefits. With over 1/2 of employees participating in incentive programs, Manatee County has seen a significant decrease in ER visits, inpatient stays, length of stay, and an increase in healthy behaviors. This session will detail how Manatee County Government reduced barriers and created a health and productivity-focused environment for employees.

### Workshop E: Study of New Online Diabetes Prevention Intervention Finds Effectiveness on Blood Glucose as Well as Wellness, Productivity Benefits

- Gladys Block, Ph.D., Scientific Director, TurnAround Health
- Marina Dolginsky, Researcher, Palo Alto Medical Foundation

The Palo Alto Medical Foundation and Turnaround Health collaborated to conduct a randomized controlled trial testing the effectiveness of a new online diabetes prevention program for overweight and obese individuals at high-risk of developing diabetes. The Alive-PD behavioral intervention focuses on reducing risk by increasing physical activity, improving eating behavior, weight loss and reducing factors such as stress. This session will discuss effects on blood glucose, weight, productivity, wellness and participant engagement.

### Refreshment Break

### Plenary Session: Employee Resilience: A Call Center Confronts High Absence with Empowering Health & Productivity Tools

- Jan Bruce, CEO & Co-Founder, meQuilibrium
- Firdows Muhammed, Senior Wellness Specialist, Comcast Cable and NBCUniversal
- Tanya Benenson, M.D. Chief Medical Officer, Comcast Cable and NBCUniversal
- Wendy Lynch, Ph.D., Founder, Lynch Consulting

In late 2013, Comcast recognized a significant correlation between stress and high absenteeism rates in their call centers. To address the problem, Comcast partnered with MeQuilibrium to give employees tools to focus on and improve their resilience. This session will define resilience, demonstrate how it reduces employee absenteeism and improves engagement, and discuss the initial impact of resilience training on continuous and intermittent employee absenteeism in Comcast’s call centers.

### Closing Remarks

Thank you for attending the 2016 IBI Annual Forum.
Hotel Map

32nd Floor
Tower Building

Second Floor

Mezzanine

Mezzanine Level
Registration

POWELL STREET LOBBY

Grand Ballroom

Colonial Room

Italian Room

Borgia Room

Georgian Room

Registration
CFOs—Ready to Invest in Healthy Outcomes

Health benefits still rank high in fostering both employee productivity and business success. So say the findings from the IBI 2015 CFO survey, revealing that many CFOs view investments in employee health as a strategic business decision. HR and benefits leaders who can quantify how their health programs enable business strategy will find it much easier to gain senior leadership support for program development and growth.

CFOs are a key partner in health benefits decisions, who could be more effective if armed with data linking benefits to business outcomes.

85% of CFOs play a role in benefits decisions

43% of CFOs say they participate in decisions as an equal partner—not just a budget approver—with other business functions, like HR

53% say they would be able to make better decisions about benefits if health-related improvements in job performance were linked to business metrics

However only 6% measure the ROI of their benefits

And only 23% measure any outcome

MISSING THE BOAT

HR and benefits leaders can add value and drive business success by focusing on achieving tangible business results as well as benefits cost and wellness program participation levels.
CFOs are motivated by more than costs.

Few CFOs foresee dramatic changes to their health benefits strategy in the next three years.

87% said cost control is one of their top 5 goals for health benefits.

Knowing they’re staying in the health care game, most have focused on cost-sharing changes and engaging employees in wellness programs.

For many CFOs, attracting, retaining, and motivating performance trumps lowering costs.

What matters?

**IMPROVING ENROLLEES’ HEALTH**

A business that puts more emphasis on helping enrollees be better health care consumers and better manage their health is more likely to:

- increase wellness programs
- link premiums to lifestyle factors
- offer financial incentives for wellness programs

**IMPROVING HUMAN CAPITAL**

A business that puts more emphasis on competing for talent and improving productivity is less likely to:

- increase high-deductible plans
- increase out-of-pocket costs
- increase employee premiums

But there’s more to the story.

34% view health benefits as an important tool to achieving strategic goals:

- attracting, retaining, and engaging talent
- helping employees become better health care consumers
- helping employees better manage their health

As the stewards of company assets, CFOs will naturally consider the cost of health benefits. However, collaboration among finance, HR, and benefits leaders can result in programs that enhance the well-being of both the business and its employees.

Thank you to Benz Communications who supported the development of our report materials.
List of Speakers

John Allen, Tennessee Dept. of Finance and Administration, Director, Behavioral Health Services
Rachel Arnedt, J.D., Aon Hewitt, Vice President—Legal
Sameer Awsare, M.D., Kaiser Permanente, Assistant Medical Director
Rodney Barnes, Manatee County Government, Florida, Human Resources Director
Teresa Bartlett, M.D., Sedgwick, SVP, Medical Director
Tanya Benenson, M.D., Comcast Cable and NBCUniversal, Chief Medical Officer
Yonatan Ben-Shalom, Ph.D., Mathematica Policy Research, Senior Researcher
Jennifer Benz, Benz Communications, CEO
Gladys Block, Ph.D., TurnAround Health, Scientific Director
Jan Bruce, meQuilibrium, CEO & Co-Founder
Wayne Burton, M.D., American Express, Global Corporate Medical Director
Robert Carr, M.D., Georgetown University, Director, Executive Master’s Program in Health Systems Administration
Jennifer Christian, M.D., Weability Corporation, President and Chief Medical Officer
Stephen Coffman, Guardian Life Insurance, Senior Life & Disability Practice Leader
Richard Dalton, CoBiz Insurance, EVP, Chief Operating Officer
Suzanne Dennis, Joerns Recover Care, Manager, HR Services
Marina Dolginsky, Palo Alto Medical Foundation, Researcher
Edie Domain, Dartmouth Hitchcock, Director of Operations Live Well Work Well
Alexandra Dumont, Sun Life Financial, AVP Product Development
Melanie DuPon, Beacon Health Options, Account Executive
Randy Ford, Unum—National Client Group, Vice President, Product and Service Solutions
Jill Fragoso, Texas Children’s Hospital, Director of Employee Health and Wellness

Martha Garcia, Kaiser Permanente, Senior Program Manager
Kimberly George, Sedgwick, Senior Vice President, Corporate Development, M&A, and Healthcare
Brian Gifford, Ph.D., Integrated Benefits Institute, Director, Research and Measurement
Amy Green, CEBS, Whole Foods Market, Senior Coordinator, Benefits and TMS Business Processes
Julie Griffith, Texas Children’s Hospital, Manager, Employee Medical Clinic and Wellness
Joe Guerriero, The Reed Group, Ltd., SVP, MDGuidelines
Gregg Hammann, Sedgwick CMS, COO
Christine Hinnerichs, American Red Cross, Absence Management/Compliance Advisor
Ben Hoffman, M.D., General Electric Oil & Gas, Chief Medical Officer, Global Health Services
Laurie Indelicato, Ultimate Software, Wellness Coach
Fikry Isaac, M.D., Johnson & Johnson, Chief Medical Officer, Health and Wellness Solutions
Michelle Jackson, Unum, Assistant Vice President Health & Productivity
Kim Jinnett, Ph.D., Integrated Benefits Institute, Executive Vice President
Cheryl Jones, Aetna Inc., Wellness Program Strategy Lead
Andrew Kallestad, CoBiz Insurance, EVP, Employee Benefits
Suneil Koliwad, M.D., Ph.D, American Diabetes Association, Diabetes Center and Department of Medicine at the University of California San Francisco, President of the American Diabetes Association San Francisco Bay Area Community Leadership Board, Assistant Professor
Roman Kownacki, M.D., Kaiser Permanente, Medical Director, Regional Occupational Health
Craig Kurtzweil Kurtzweil, UnitedHealth Group, Senior Vice President, Analytic Innovations
Deborah LaBonar, Ph.D., Aon Hewitt, Senior Director, Absence Analytics
Gene Lanzoni, Guardian Life Insurance, Assistant Vice President, Market & Customer Insights
Debra Lerner, Ph.D., Tufts Medical Center, Director, Program on Health, Work and Productivity
Wendy Lynch, Ph.D., Lynch Consulting, Founder
Kimberly Mashburn, The Hartford, Disability, Absence & Wellness Sales Consultant
Dawn Milligan, Reynolds American, Inc., Director, Health and Welfare Operations
Matt Morris, J.D., ComPsych, VP of FMLASource
Firdows Muhammad, Comcast Cable and NBCUniversal, Senior Wellness Specialist
Rebecca Nellis, Cancer and Careers, Chief Mission Officer
Agnes Nines, Arthur J. Gallagher & Co., Practice Leader, Absence Management
Thomas Parry, Ph.D., Integrated Benefits Institute, President
Nirmal Patel, M.D., Teladoc, Chief Medical Information Officer
Rich Paul, Beacon Health Options, Senior Vice President, Employer Strategy & Development
Brent Pawlecki, M.D., The Goodyear Tire & Rubber Company, Chief Health Officer
Tom Pela, Quest Diagnostics, Director of Health & Wellness
Susan Piglia, Ochsner Health System, Assistant Vice President, Corporate Wellness
Julie-Ann Poll, Aetna Inc., Business Project Program Sr. Manager
Pat Purdy, Pacific Resources, VP Global Employer Solutions
Tonyia Ragland-Davis, Michelin North America, Inc., Corporatte Disability Manager & MDMS Manager
Eric Reisenwitz, Lincoln Financial Group, SVP, Head of Group Protection Product & Operations, Lincoln Financial Group
Dan Roach, San Francisco Municipal Transportation Agency, Manager, Worker’s Compensation, Industrial Safety and Road to Fitness
Marjory Robertson, J.D., Sun Life Financial, AVP & Senior Counsel
Jane Ryan, Mayo Clinic, Return to Work Section Head

Steven Serra, M.D., Aetna Inc., Senior Medical Director
Bruce Sherman, M.D., Employers Health Coalition, Medical Director
Michael Sokol, M.D., Sanofi, Chief Wellness Officer
Kim Stroud, Manatee County Government, Florida, Employee Benefits Division Manager
Leroy Thomas Jr, Texas Children’s Pediatrics and Urgent Care, Director, Central Business Office
Lisa Trepanier, Bemis Company, Inc., Director, Global Mobility & HR Administration
Janelle Tucker, Tesla Motors, Telsa Benefits Analyst
Kristin Tugman, Ph.D., Prudential, VP, Health & Productivity Analytics and Consulting Practice—Group Insurance
Sander VanderWerf, Aon Hewitt, Vice President
Wendy Werve, Virgin Pulse, Chief Marketing Officer
Jim West, Michelin North America, Inc., Manager of Employee Life Services for Michelin North America (Retired)
Steve Wiesner, M.D., The Permanente Medical Group, Inc., Chief, Occupational Health Department, Kaiser Permanente East Bay Medical Center
Ruth Wolever, Ph.D., eMindful, Chief Scientific Officer
Paulette Wright, Hackensack UMC, Director Employee Population Health & Pension Strategies
Lynn Zornakis, Delta Airlines, Former Managing Director of Health Strategy and Resources (Retired)
Gary Zyla, AssetMark, CFO
Speaker Biographies

John Allen
Tennessee Dept. of Finance and Administration
Director, Behavioral Health Services

John has been working in the behavioral health field over 20 years ago as a case manager in a community mental health center. Following graduate school, he worked on an inpatient behavioral health unit before moving into the employee assistance field. His first role in workplace behavioral health was as an internal employee assistance program counselor for a nonprofit hospital. Later he led a group of employee assistance counselors and managed the behavioral health benefit for a large health system. During his time with the health system, the Employee Assistance Program grew to serve 5 hospitals in the region.

After obtaining the Senior Professional in Human Resources certification, he worked for several years as an employee relations director. In 2008, he returned to the workplace behavioral health sector, as the Director of Behavioral Health Services for the state of Tennessee’s employee health plan. In his current role he manages both the employee assistance program and the behavioral health benefits for the 275,000 lives covered by the plan.

John is an active member of his local Employee Assistance Professionals Association, and is currently serving as a commissioner on the Employee Assistance Certification Commission. When not thinking about how to create emotionally healthy workplace cultures, John enjoys spending time with his wife and their two children. He also enjoys taking spin classes, hiking, and traveling with his family.

Rachel Arnedt, J.D.
Aon Hewitt
Vice President—Legal

Rachel is a vice president in the Aon Hewitt Health & Benefits Legal Consulting Group. In this capacity, she consults with clients on plan design, compliance, and communications, with a concentration in ERISA and the Patient Protection and Affordable Care Act.

Prior to joining Aon Hewitt, Rachel practiced at a law firm for over a decade in all areas of ERISA and executive compensation. She also spent five years at a Fortune 50 company as an in-house ERISA and executive compensation counsel.

Rachel is a vice president in the Aon Hewitt Health & Benefits Legal Consulting Group. In this capacity, she consults with clients on plan design, compliance, and communications, with a concentration in ERISA and the Patient Protection and Affordable Care Act.

Sameer Awsare, M.D.
Kaiser Permanente
Assistant Medical Director

Dr. Sameer Awsare is an Associate Executive Director for The Permanente Medical Group in charge of Pharmacy, Adult and Family Medicine, Risk Adjusted Coding, Revenue Cycle and Outside Medical Services.

Dr. Awsare joined the Permanente Medical Group in 1993. In addition to his clinical responsibilities, he has served in a number of other roles. He is involved in resident teaching and was the Chair of the Hospital Ethics Committee. He has also been involved in Medicare Coding and Compliance at the medical center level. He was the Chief of Medicine at our Campbell facility. He has been a member of TPMG Board of Directors since 1997 to 2014, and served as its secretary from 2000 to 2006. He also served as Chair of the board’s Governance Committee and the Vice Chair of the Board from 2006 to 2014.

Dr. Awsare is board certified in Internal Medicine. He received his BS in Biology, and his MD from the University of California, Irvine. He has served on the voluntary clinical faculty at the Stanford University of School of Medicine. Dr. Awsare is a fellow of the American College of Physicians.
Rodney Barnes was named Human Resources Director for Manatee County Government, Bradenton, FL, effective August 4, 2014. He is charged with optimizing the County’s organizational effectiveness by providing leading human resource services that inspires and supports excellence in people and enhances employee commitment to the County’s mission. He oversees the areas of talent acquisition and retention, compensation and job classification, total rewards programs including insurance and retirement benefits administration, learning and development, labor relations, workforce planning, strategic development, HRIS administration, EEO/AA compliance, and personnel policies and procedures.

Previously, Rodney served as the Executive Director of Human Resources for the Elk River Area School District, Elk River, Minnesota from 2009 until 2014. There, he served as the school district’s Chief Human Resources Officer, Chief Labor Contract Negotiator, Equal Employment Opportunity Officer, Legal Compliance Officer, and Data Retention Officer. He previously served as Human Resources Director for the Osseo Area School District, Maple Grove, Minnesota and the Duluth Public Schools, Duluth, Minnesota.

Rodney is a retired veteran from the U.S. Coast Guard and completed his 21-year career as Human Resources Director, U.S. Coast Guard Group Ketchikan, Alaska where he provided service and support for Coast Guard units across Southeast Alaska.

Rodney has been professionally active in the human resources community as a member of the Society for Human Resource Management (SHRM), North American Association of Educational Negotiators (NAEN), and Minnesota Association of School Personnel Administrators (MASPA).

Rodney holds a Bachelor’s degree in Business from Regents College—University of the State New York.

Teresa Bartlett joined Sedgwick CMS in January of 2009 as Senior Vice President and Medical Director. She has a background in Family Medicine and began her business career by joining a large automotive manufacturer. She spent 20 years managing large self-insured, multi-state workers’ compensation programs and the Canadian workers’ compensation program. The short term disability (STD) program which Dr. Bartlett managed was union negotiated. She developed an evidence based medical substantiation process which saved millions of dollars and reversed the escalating STD trend. She led the team that won the Corporate Health Achievement Award from ACOEM in 2005 for the Development and Implementation of a Best Practice Clinical Model.

During her career she has had the opportunity to manage and mold wellness and fitness programs which evolved into award winning programs that were integrated into the benefit and claim structure. Dr. Bartlett was the recipient of the Crain’s Detroit Business 2008 Health Care Hero Award for bringing a new and innovative program to address back pain into the workplace. In 2012 she was a Business Insurance recipient of Women to Watch.

As medical director for Sedgwick CMS, Dr. Bartlett is the senior advisor in matters affecting the design and delivery of medical management services for the company’s claims clients. She provides strategic counsel and operational support in all areas of medical management including managed care, return-to-work, bill review, medical outcomes protocols, and health and safety matters. Dr. Bartlett also advises on the methods and ways to integrate the delivery of occupational and non-occupational medical services and the matters affecting healthcare as part of the claims services process.
**Tanya Benenson, M.D.**  
**Comcast Cable and NBCUniversal**  
**Chief Medical Officer**

Dr. Tanya Benenson is the Chief Medical Officer and VP, Strategic Health Initiatives of Comcast NBCUniversal. Dr. Benenson leads a team responsible for strategic clinical and wellness program development and benefit design for the Company’s 139,000 employees and their families. She also oversees Health Services including on-site clinics, Olympics medical services, travel health, and medical crisis management.

Dr. Benenson started at NBCUniversal in 2001 as a part-time clinical consultant in their on-site clinic in New York City. Before joining NBCUniversal full time in 2005, she ran an Internal Medicine private practice and taught Medical residents while consulting for NBCUniversal, ABC and HealthiNation.

At NBCUniversal, Dr. Benenson managed a variety of clinical and Human Resource functions. In past roles, Dr. Benenson oversaw U.S. employee benefits including disability and workers’ compensation case management, health care cost management, EAP services, work-life balance programs and wellness programs. She continues to oversee the Comcast NBCUniversal Health Services team that manages the five U.S. on-site clinics that provide employee medical care for personal and work-related injuries and illness. Dr. Benenson also provides in-house medical consultation to various departments such as Legal, Environmental Health and Safety, Production, and HR as well as to news programs such as the Today Show and Nightly News and shows on MSNBC and WNBC, on and off the air.

Dr. Benenson works and resides in New York City.

**Yonatan Ben-Shalom, Ph.D.**  
**Mathematica Policy Research**  
**Senior Researcher**

Dr. Ben-Shalom is a senior researcher at Mathematica Policy Research’s Center for Studying Disability Policy, with expertise in policies and programs related to the employment and income of people with disabilities—especially those who acquire disability in adulthood such as workers and veterans. He directs the Stay-at-Work/Return-to-Work Policy Collaborative, a project funded by the Office of Disability Employment Policy at the U.S. Department of Labor. The Collaborative focuses on advancing policies and programs that promote positive SAW/RTW outcomes for workers who experience a potentially career-ending medical condition. Dr. Ben-Shalom has served as principal investigator for numerous studies funded by the Social Security Administration and the National Institute on Disability, Independent Living, and Rehabilitation Research. He has a Ph.D. in Economics from the Johns Hopkins University.

**Jennifer Benz**  
**Benz Communications**  
**CEO**

Jen has been on the leading edge of employee benefits for nearly 15 years. A well-known expert, Jen recently testified before the Department of Labor’s ERISA Advisory Council regarding retirement education and was named one of Workforce Magazine’s, Game Changers. She is widely quoted in publications, including Employee Benefit News, Human Resource Executive, The Conference Board Review and Workforce. She speaks and writes as an authority on the changing benefits landscape—particularly the areas of health care reform, social media and the critical role of effective communication. Prior to starting Benz Communications, Jen spent seven years at Aon Hewitt.

**Gladys Block, Ph.D.**  
**TurnAround Health**  
**Scientific Director**

Gladys Block obtained her PhD in Epidemiology from Johns Hopkins, and was a researcher at the National Cancer Institute. She joined the faculty at the School of Public Health, University of California at Berkeley in 1991, and became the Director of the Public Health Nutrition Program. She retired from teaching in 2008, and became Scientific Director of NutritionQuest, a small business in Berkeley.

Her research and development efforts have emphasized translational work to make the results of nutrition research directly useful to the public through low-cost technology-based tools. While at the National Cancer Institute she created a program to develop and validate assessment tools and make them available to researchers. Her dietary assessment questionnaire and its various versions has become widely known. NutritionQuest provides her diet and activity assessments to researchers nationwide. Building on her expertise in assessment, she developed and tested technology-based interventions to help individuals change their health behaviors. The most recent of these, an intervention to help persons at risk of diabetes to change their eating and physical activity, is made available by Turnaround Health.
Jan Bruce
meQuilibrium
CEO & Co-Founder

Jan Bruce is CEO and co-founder of meQuilibrium, the digital coaching platform based on the science of resilience. An entrepreneur with a proven track record, Jan has a passion for building consumer-grade products that help people make measurable improvements in health and wellness. Prior to meQuilibrium, Jan was managing director and publisher at Martha Stewart Living’s Whole Living/body + soul magazine. Earlier she served as CEO and co-founder of Integrative Medicine Communications, the leading digital brand in science-based complementary medicine. Jan’s mission is to help both individuals and corporations achieve measurable results in emotional wellbeing, stress management, and performance optimization.

Wayne Burton, M.D.
American Express
Global Corporate Medical Director

Wayne N. Burton, M.D. is the Chief Medical Officer at the American Express Company. Since 2009, Dr. Burton has been responsible for the company’s Wellness Centers internationally, the global Employee Assistance Program and Safety programs in the US for more than 50,000 employees. Dr. Burton drives measurement and analysis to strengthen the company’s wellness offerings and address health care gaps for employees. Previously, he was Corporate Medical Director for JPMorgan Chase and its legacy banks for more than 25 years starting the company’s first wellness program in 1982 and integrated health data management system in 1987.

In 2015, he was the recipient of the Mark Dundon Research Award from HERO (Health Enhancement Research Organization). In addition, he was the first recipient of the Global Health Leadership Award from NBGH/ACOEM. The following year, he was honored with the Meritorious Service award and the President’s Award from the American College of Occupational and Environmental Medicine. He has been the recipient of several industry awards including the Health Achievement Award from the American College of Occupational and Environmental Medicine (ACOEM), the Jonas Salk Health Leadership Award from the March of Dimes, the Innovation Award from Mental Health America and Innovation in Health and Productivity Award from National Business Group on Health (NBGH).

Since 1978, Dr. Burton has been an associate professor of clinical medicine at the Feinberg School of Medicine at Northwestern University. He’s also an adjunct professor of Environmental & Occupational Sciences at the University of Illinois at Chicago.

He is on the editorial boards of Population Health Management and the Journal of Health and Productivity and has authored or co-authored almost 100 articles on various aspects of employee health and productivity.

Robert Carr, M.D.
Georgetown University
Director, Executive Master’s Program in Health Systems Administration

Bob is a Professor and Director of the Executive Master’s program in Health Systems Administration at Georgetown University. He also chairs the Occupational Residency Advisory Committee at the University of Pennsylvania, is on the Health Advisory Board at Johns Hopkins Bloomberg School of Public Health and the Dean’s Advisory Board at the Drexel School of Public Health and is President - Elect of the American College of Preventive Medicine.

Bob was most recently the Senior Vice President & Corporate Medical Director at the global healthcare firm GlaxoSmithKline with a career spanning 25 years. At GSK he provided strategic direction and leadership in all areas of employee health and performance. Prior to GSK Bob worked in the US Air Force Surgeon General’s Office of Disease Surveillance & Health Promotion.

Bob received his Doctor of Medicine from the University of Miami School of Medicine and his Masters of Public Health and Preventive Medicine Residency from The John Hopkins Bloomberg School of Hygiene & Public Health.
Jennifer Christian, M.D.
Webility Corporation
President and Chief Medical Officer

Jennifer Christian, MD, MPH is a physician thought leader committed to minimizing the impact of health conditions on quality of life and preventing needless work disability across all benefits systems. She is board-certified in occupational medicine with both medical and public health degrees from the University of Washington in Seattle. Dr. Christian has been described as a self-appointed envoy between the various sectors of society and has won several awards for her efforts to bring the work disability prevention model to the fore. She is President of Webility Corporation which provides consulting services to clients in the healthcare, employment, insurance and governmental sectors. A leader in the American College of Occupational & Environmental Medicine (ACOEM), Christian has served as chair of its Work Fitness and Disability Section since 2001. In addition, she moderates the multi-stakeholder Work Fitness & Disability Roundtable, an e-group whose 1400 members are professionals involved with these issues. Before founding Webility, Christian was chief medical officer for ManagedComp; worked with Milliman & Robertson Actuaries and Consultants; led a new business development team within CIGNA’s California HMO; and served as president of the Alaska Medical Association. Her newest adventure is blogging at www.jenniferchristian.com

Stephen Coffman
Guardian Life Insurance
Senior Life & Disability Practice Leader

Stephen Coffman has over 20 years’ experience in corporate benefits and insurance. During the last 17 years he has managed disability and leave teams before serving as Director of Client Solutions for a Top 5 carrier. Stephen’s current position at Guardian Life is Senior Group Practice Leader. In this role he utilizes his extensive disability experience to assist key clients and producers in better understanding claim best practices and possible solutions that create value for companies and their employees.

Richard Dalton
CoBiz Insurance
EVP, Chief Operating Officer

Richard Dalton is Chief Operations Officer at CoBiz Financial, a $3.6 billion financial services company with more than 550 employees. He is actively involved in the firm’s employee wellness programs, which focus on benefits and employees’ physical, mental and financial wellbeing.

Dalton has worked in the financial services industry for over 30 years and has served as Chief Operations Officer, Chief Financial Officer, Chief Risk Officer, President and Chief Executive Officer at three different organizations ranging in size from $800 million to $3.6 billion in assets. His experience includes assets liability management, mergers and acquisitions, taking a company public, risk management and operational responsibilities for commercial banks, savings and loans, insurance lines, wealth management groups and a boutique investment banking firm.

Dalton received a Bachelor of Science in Business Administration from the University of Southern Colorado and a Masters of Business Administration with emphasis on Finance from the University of Colorado. He has served on the boards of Young Americans Bank, College Invest, and The Griffith Center for Children, and he is a member of the National Association of Corporate Directors. He is also a cofounder of Biz Bash, a 501(c)3 organization that has raised more than $4.5 million to support organizations working with at-risk women and children. In addition, he is a committee member of Men for the Cure, a not-for-profit group that fundraises for the University of Colorado Breast Center and has raised more than $2.5 million for breast cancer research.

Suzanne Dennis
Joerns Recover Care
Manager, HR Services

Suzi is the Manager of HR Services for Joerns RecoverCare. The HR Services division manages all aspects of Payroll, Benefits, Leave Management and Workers Compensation for the Company. Joerns RecoverCare has over 1500 employees in 48 U.S. states and is revolutionizing healthcare through an unmatched suite of advanced prevention, patient care and handling products, services and programs. To maximize the performance of our customers, Joerns RecoverCare brings to market an industry-leading suite of products, technologies, services and programs that provides an unmatched level of quality, value, and efficiency.
As a manufacturer and leading provider across the full continuum of care, JRS has operations throughout the US, Canada, the UK and the Netherlands with export sales in the EEMEA and Australasia markets. Joerns RecoverCare has a rich history dating back to 1889, with industry-leading brands that include Dolphin® fluid immersion simulation system, Joerns® healthcare beds and Hoyer® & Oxford® patient lifting and repositioning products. Joerns is market share leader in the Government (Veterans), Post-Acute and Long-term Acute Care markets with growing sales and presence in the Hospital market.

Suzi joined the RecoverCare team in 2012 and has led the combined Joerns RecoverCare organization through several acquisitions and a company merger. She has led many initiatives on process improvement, reduction of costs and risk reduction; including migrating benefit plans to a single combined offering and implementation of a single payroll and timekeeping platform. Suzi is a Human Resources professional with 15 years of experience specializing in payroll and benefits. She attended Indiana University with a major in Sports Communications and currently resides in Louisville, Kentucky.

Marina Dolginsky
Palo Alto Medical Foundation Researcher

Marina Dolginsky is a Research Assistant at the Palo Alto Medical Foundation Research Institute. She provides support to numerous clinical research studies. Some of her responsibilities include assistance in the development and implementation of recruitment strategies, writing sections of research protocols and reports, initiating and maintaining contact with study participants including performing study visits and working closely with Principal Investigators and IRB to ensure proper protocol is followed.

Before joining the Palo Alto Medical Foundation Research Institute, Marina studied biology and biochemistry at Notre Dame de Namur University graduating with a bachelor’s degree in 2013.

In her spare time Marina loves to read and hike with her rescue dog Charlie.

Edie Domian
Dartmouth Hitchcock
Director of Operations Live Well Work Well

Edie Domian is the Director of Operations for Dartmouth-Hitchcock LiveWell WorkWell. In her role, Edie directs enterprise wide employee health protection and promotion programs for 16,000 employees and their dependents, and is responsible for the development of integrated and coordinated corporate health care services that extend both within and beyond the Dartmouth Hitchcock Health system. Her work and direct oversight encompasses Occupational & Environmental Medicine, Safety, Workers Comp, EAP, Employee Wellness, Primary Care and Care Coordination programs. In 2013, Edie led her team in achieving Specialty Practice NCQA Level 3 Recognition Seal in Occupational Medicine; one of the first early adopters to be recognized in the nation. Her passion for creating strategies around improving population health and wellness outcomes focus her work on developing innovative Care Coordination and Primary Care models and blending employee programs into a Total Worker Health® design. Additionally, Edie’s 20 year healthcare career captures over a decade of service within the military health system, including a tour in Afghanistan where she led NATO initiatives to establish key healthcare and trauma facilities, and created systems to fund a national Afghan employee screening program. She continues her almost 20 year military career in the Reserves as a Chief Administrator. Edie earned her B.S. in Psychology from University of State of New York and her M.S. Health Care Management and MBA from Marymount University in VA.

Alex Dumont
Sun Life Financial
AVP Product Development

Alex Dumont is Assistant Vice President of Product Development at Sun Life Financial, U.S., where she oversees the management and enhancements of Sun Life’s employee benefits product suite. Dumont leads development of new and existing Life and Disability product features, as well as value added services, and drives the strategic planning process to ensure products meet emerging industry trends and evolving customer needs.

Previously, Dumont was Assistant Vice President of Product Marketing at Standard Insurance Company in Oregon. Prior to that she spent six years with Sun Life, where she was Assistant Vice President of Product Management for Individual Solutions, Voluntary & Employee Benefits. In addition to her extensive background in product management and marketing, Dumont has experience in underwriting and distribution from Unum, CNA, and The Hartford. Dumont received her Bachelor’s in Economics from Bates College.
Melanie DuPon
Beacon Health Options
Account Executive

Ms. DuPon is responsible for overseeing and managing self-insured behavioral health and psychiatric disability management benefits and Employee Assistance Programs for major Fortune 500 companies. Additionally, she is directly responsible to the corporate customer for all reporting, claims payment processing, service satisfaction and overall service delivery. She uses both empirical and qualitative data analysis methods to guide client recommendations for quality programming, improved member outcomes and demonstrated return on investment. One client with an integrated program design boasts a 10 percent EAP utilization rate, achieved in 2014 and sustained in 2015.

With over 24 years of experience in the health care industry, Ms. DuPon has worked with a variety of service models, having direct program experience in Canada, the United Kingdom and the United States. Prior to joining Beacon, Ms. DuPon served as a Director of Quality Assurance for the Kennedy Institute where she oversaw agency-wide quality assurance and improvement systems. She also conducted reviews of community-based programs for people with developmental disabilities for the Courts. Later, she conducted outcomes reviews and program evaluation for both local and federal government social service programs.

Ms. DuPon received a Master of Arts in Policy Studies from Johns Hopkins University, as well as a Bachelor of Arts degree in Political Studies and Sociology from Trent University.

Randy Ford
Unum—National Client Group
Vice President, Product and Service Solutions

Randy Ford serves as Vice President in Unum’s large employer business segment – National Client Group. He is responsible for the development and management of various strategic programs and initiatives supporting Unum’s large employer business. Responsibilities include: product and service solutions, broker and consultant markets, and strategic market development. He also serves as Unum’s Executive Sponsor for the Unum/UnitedHealthcare partnership program.

Ford currently serves on the board of directors for the Morrison Center, a Maine not-for-profit providing education and services, as well as, residential housing to children and adults with developmental disabilities.

Ford earned a degree in business administration from the University of Maine.

Jill Fragoso
Texas Children’s Hospital
Director of Employee Health and Wellness

Jill joined Texas Children’s Hospital in July, 2013 as the Director of Employee Health and Wellness. Ranked 4th nationally among children’s hospitals by U.S. News & World Report, Texas Children’s is located in Houston, with nearly 11,000 employees. She oversees business and clinical operations for the onsite Employee Medical Clinic, Occupational Health Clinic, Employee Assistance Program, leave of absence program and employee wellbeing program. Prior to working at Texas Children’s, Jill served as the System Director of Employee Health and Workers’ Compensation for Presence Health, a 12-hospital system headquartered in Chicago. While there, Jill led efforts to improve worker health and safety, resulting in a decrease of $4M in workers’ compensation costs during her final two years. She received both her BSN and MA in Health Promotion from the University of Iowa, where she was also a varsity diver on the Women’s Swimming and Diving Team. Jill has presented at conferences and seminars on the topics of promoting and protecting worker health, and wellness in the workplace. She and her husband are both Ironman triathletes. They have five children and live in Houston, Texas.

Martha Garcia
Kaiser Permanente
Senior Program Manager

Martha Garcia leads strategic customer engagement projects for Kaiser Permanente’s Integrated Disability Management program (Kaiser Employees) and Kaiser’s commercial health plan customers (Kaiser members). She has over 25 years of experience in workforce health programming and health plan benefits design. She specializes in disability and family medical leave consultation and program integration and has worked with a variety of industries including government, private and non-profit enterprises.

Martha obtained her Bachelors while still living in Colombia, SA. She completed her Executive Program in Management from UCLA’s John Anderson’s Graduate School of Management and has her Life & Health License in CA and IL. She is currently part of the UCI Women’s Empowerment Initiative program as well as serves on the Southern California/South Bay chapter board of directors for the Disability Management Employer Coalition (DMEC).
Kimberly George
Senior Vice President, Corporate Development, M&A, and Healthcare

Ms. George is a senior vice president, corporate development, M&A, healthcare at Sedgwick. In this new position, Kimberly will explore and work to improve Sedgwick’s understanding of how health care reform affects its business models and product and service offerings.

Kimberly previously served as Sedgwick’s managed care practice lead. She joined Sedgwick in 2001 overseeing integrated disability medical programs and later case management services.

Prior to joining Sedgwick, Kimberly worked as a consultant within the 24-hour health and integrated disability management arena. She also held a leadership position with a large national managed care organization’s case management division. Her career has focused on creating health and productivity programs for employers, impacting quality and cost of risk. Kimberly has been a registered nurse for 20 years. Although she began her career as a neuro-trauma nurse, she quickly transitioned to the insurance and benefits arena. Her experience in the cost containment field spans nearly 20 years. Kimberly’s roles in the property and casualty field include product development, national telephonic case management and utilization review oversight, and integrated disability management as well as her previous position with Sedgwick as managed care practice lead. Her insurance background includes workers’ compensation, short- and long-term disability, auto, liability, professional liability, longshore and total absence management.

Kimberly is an excellent presenter and a frequent speaker at national conferences and events. She is often featured in industry journals and publications and is a highly regarded authority in the managed care and workers’ compensation arena.

Brian Gifford, Ph.D.
Integrated Benefits Institute
Director, Research and Measurement

Brian Gifford researches workforce health and business performance for the Integrated Benefits Institute (IBI). He has been a lead or contributing author of Institute-published studies on topics such as the productivity impact of high-deductible health plans, CFOs' strategic approaches to health benefits and wellness programs, and establishing the links between a healthy human capital and business performance. Dr. Gifford received his Bachelor’s degree in sociology from the University of California, Berkeley, and his Ph.D. in sociology from New York University. His past appointments include a postdoctoral fellowship in the Robert Wood Johnson Foundation’s Scholars in Health Policy Research Program at the University of California, Berkeley, and as a social scientist with the RAND Corporation.

Amy Green
CEBS, Whole Foods Market
Senior Coordinator, Benefits and TMS Business Processes

Amy C. Green is the Director for Benefits and Team Member Services (HR) Business Processes for Whole Foods Market, a Fortune 500 company with 431 locations across 42 states and three countries. Amy has been with Whole Foods Market for 17 years and is responsible for the design, development, implementation, management and ongoing review of the company’s benefit and wellness plans. She also oversees the WFM Business Process (HR technology) team.

Prior to Whole Foods Market, Amy was in Benefits Management for Temple Inland and California Pizza Kitchen where she was responsible for vendor management and administration.

Amy received her Bachelor degree of Psychology from The University of California, Los Angeles and her Masters in Clinical Psychology from Pepperdine University. Amy also earned her Certified Employee Benefits Specialist (CEBS) certification in 2003. Amy resides in Austin with her husband, two children and two step-children.

Julie Griffith
Texas Children’s Hospital
Manager, Employee Medical Clinic and Wellness

Julie Griffith is the Manager of the Employee Medical Clinic and Wellness at Texas Children’s Hospital. Julie pioneered the Texas Children’s wellbeing program and is responsible for overseeing the strategic planning, implementation, and evaluation of wellbeing initiatives for the 13,000 workforce across greater Houston. Additionally, Julie manages the Employee Medical Clinic, the first onsite primary care clinic in the Texas Medical Center. Julie earned her undergraduate degree at Texas A and M University, where she served as the goalkeeper on their division 1 soccer team. She earned her Masters of Public Health degree, specializing in Health Promotion and Behavioral Science from the University of Texas School of Public Health. Julie has completed many speaking engagements and served as an expert panelist for Certified Employee Benefits Specialist (CEBS) event Emerging Trends in Wellness and Compass Group and Plus One Wellness Rx for the Future: Food and Physical Activity for your Wellbeing
Strategy. Julie’s mission is to activate the workforce around a collective vision of wellbeing and encourage employees to thrive in their personal and professional lives. Julie and her husband Tyler are proud parents to a one year old boy named Cameron.

**Joe Guerriero**  
The Reed Group, Ltd.  
SVP, MDGuidelines

Joe Guerriero is the Senior Vice President of Reed Group’s MDGuidelines™ division. Joe joined Reed Group in 2014, bringing over 20 years of experience in publishing and health care, as well as expertise in marketing, advertising and digital strategy, to the executive team. Before joining Reed Group, Joe was Vice President/Group Publisher at Eagle Publishing, where he ran the company’s $25M political media group, including the nationally known RedState.com. Joe has held leadership roles at Success Media, Billboard, and Healthleaders, Inc. He recently moved to Westminster, CO, with his family from the East Coast. Joe is a graduate of Manhattanville College.

**Gregg Hammann**  
Sedgwick CMS  
COO

Gregg Hammann is the Chief Operating Officer of Sedgwick Inc., the global leader in health care claims management. His focus is on helping Sedgwick transform health care in the United States to an Integrated Consumer First model. In this role Gregg has responsibility for Finance, Marketing, Information Technology, Legal, Real Estate, Strategy, Human Resources, Mergers and Acquisitions and Industry Relations. He has also served as the Chief Strategy Officer and Chief Financial Officer of the Company.

From 2007 through 2014, he owned the consulting firm Action-Advisors, helping companies develop strategic planning capabilities. As part of this consulting platform he has acted as President or CEO of several companies including Power Plate International, Fusionetics, and Frantz Ventures. He previously served as President, CEO and chairman of Nautilus Inc.; Global Chief Customer Officer and President for Canada and Latin America at Levis Strauss & Company; and Vice President of Global Fountain CMG and Director of Strategic Issues at The Coca-Cola Company (the first Officer hired from outside the company in its history).

Mr. Hamman graduated from the University of Iowa in Business where he participated in football and track, receiving the Lester Boekey award for the Outstanding Student Athlete his senior year. He has an MBA from the University of Wisconsin and has a certification from UCLA’s Anderson School of Business in Sarbanes-Oxley accounting as a Financial Audit expert. He also earned NASM trainer certification with a PES in youth training and Corrective Exercise Science.

Gregg is married with three children. He volunteers his time coaching youth sports and helping local and global charities.

**Christine Hinnerichs**  
American Red Cross  
Absence Management/Compliance Advisor

Christine Hinnerichs has over 10 years of Human Resources experience. Early in her career, she developed an interest in the area of employee leaves and the data associated with those claims. She has been with the American Red Cross for 4 years and currently serves as an Absence Management & Compliance Advisor. In her position, she advises Human Resources professionals and managers in a 26 state territory how to navigate complex leave of absence related issues while maintaining compliance with state and federal law, manages workplace accommodation requests in accordance with the Americans with Disabilities Act and strives to use leave analytics to improve leave trends within the organization.

Prior to her current position at the Red Cross, she spent 7 years working as a Human Resources Generalist at manufacturing and technology companies. Christine received her Bachelor of Science in Business Administration from the University of Nebraska and has maintained a PHR certification since 2006. She currently resides in Omaha, Nebraska with her husband and 2 young daughters.

**Ben Hoffman, M.D.**  
General Electric Oil & Gas  
Chief Medical Officer, Global Health Services

Dr. Ben Hoffman MD, MPH is a GE business Global Chief Medical Officer. Dr. Hoffman leads a global team of professionals who deliver value to the business through programs and services that promote employee health, safety and productivity. Key functions managed by Global Health Services include medical, absence and disability management, remote destination traveler health, health promotion/HealthAhead support, worksite injury and disease prevention, medical services and management of worksite-based health clinics worldwide. Dr. Hoffman trained at Yale, Brown and Mt. Sinai School of Medicine and is board certified in internal medicine, preventive medicine and environmental/occupational health. He has published widely and holds Adjunct Professorships at the University of Texas School of Public Health and Tufts.
University Friedman School of Nutrition. He is active on numerous committees including Global Health at the National Academy of Medicine, IPIECA and ICHLC.

**Laurie Indelicato**  
**Ultimate Software Wellness Coach**  
Laurie is the Wellness Director for Ultimate Software. With her passion for people she restores the health to her fellow employees through many innovative ways like detoxification then restoration of damaged cells. Education on what has caused their current health issues and then correcting it.

**Fikry Isaac, M.D.**  
**Johnson & Johnson Chief Medical Officer, Health and Wellness Solutions**  
Dr. Isaac is Vice President of Global Health Services for Johnson & Johnson, Inc., in New Brunswick, New Jersey. In this role, Dr. Isaac directs the development of health and wellness strategies, policies, guidelines, and services worldwide (Occupational Medicine, Employee Assistance Program and Wellness). Dr. Isaac is also the Chief Medical Officer for Johnson & Johnson’s Health & Wellness Solutions—a company offering comprehensive wellness solutions for employers, health plans, and other organizations.

Dr. Isaac is a pioneer in the field of workplace health promotion and global health, and has introduced innovative approaches to improve the health and wellbeing of populations. He is a published author in this field and continues to research population health interventions, using rigorous scientific methods, to ensure that these interventions deliver meaningful outcomes. His broad view spans the fields of clinical medicine, behavior change technologies, and economic analyses. Dr. Isaac is an outspoken champion of prevention and health promotion and has achieved remarkable success within Johnson & Johnson – gaining senior management support and funding for health improvement initiatives for all Johnson & Johnson employees worldwide.

Dr. Isaac was the 2013 recipient of the Global Leadership in Corporate Health Award, recognizing his career as a proponent of workplace health and wellness for Johnson & Johnson. The award is sponsored by the American College of Occupational and Environmental Medicine (ACOEM) and the National Business Group on Health. He was also the recipient of the 2013 Donald H. Gerson Cancer Prevention and Public Policy Award from the American Cancer Society and the 2013 U.S. Chamber of Commerce’s Leadership in Health Care Award.

**Michelle Jackson**  
**Unum Assistant Vice President Health & Productivity**  
Michelle holds a Bachelor of Science degree in psychology and a master’s degree in social work, both obtained in Virginia. She initially practiced clinical social work in Virginia and Tennessee, specializing in adult issues and specifically the treatment of the Impaired/ Addicted Professionals at the Farley Institute. She has been with Unum for over 18 years in a variety of roles, initially as a clinical consultant then transitioning into a leadership role as Clinical-Vocational Director with responsibility for the development of Return to Work strategies and management of the clinical and vocational resources of Unum. This was followed by 10 years in the Washington, DC Sales Office as a National Client Manager responsible for service and sales to large complex customers—working closely with employers to develop benefit solutions within the disability arena. Michelle is now leading the Workforce Solutions Group at Unum focused on developing absence management solutions for 2,000+ complex customers.

**Kim Jinnett, Ph.D.**  
**Integrated Benefits Institute Executive Vice President**  
Dr. Kimberly Jinnett is Executive Vice President at the Integrated Benefits Institute. Jinnett joined IBI in June 2005 and is responsible for overseeing IBI’s research. Previously, she was a health policy researcher at RAND and at the Department of Veterans Affairs. Most recently, Dr. Jinnett served as Senior Evaluation Officer, developing and managing research investments for a major national foundation across a variety of substantive areas including leadership, organizational behavior, use of incentives and social change. She has served in senior management positions in a variety of nonprofit organizations, county and federal agencies. Jinnett received her bachelor’s degree in psychobiology and master’s degree in public health from the University of California, Los Angeles. She received her Ph.D. in sociology and health services organization and policy from the University of Michigan, Ann Arbor.
Cheryl Jones  
Aetna Inc.  
Wellness Program Strategy Lead

Cheryl Jones is passionate about mindfulness and believes it can transform workplace culture through mindful leadership and increased employee wellbeing and effectiveness. Cheryl has been at the forefront of design, development, marketing and management of Aetna’s mindfulness-based wellness programs. She co developed and is leading Aetna’s 3-Year Mindfulness Strategy. Throughtout her career as a healthcare professional, Cheryl has launched three start-ups. She completed the Teacher Development Intensive in Mindfulness-Based Stress Reduction (MBSR) through the Center for Mindfulness at UMass Medical School. She holds a Master’s degree in exercise science from the University of Connecticut and a Certificate in Spirituality from the University of Saint Joseph. She is the author of Mindful Exercise.

Andrew Kallestad  
CoBiz Insurance  
EVP, Employee Benefits

Andrew Kallestad has been a leader in the employee benefit industry for more than 28 years. He joined CoBiz Insurance in 2004 and his current responsibilities include designing, implementing and managing proactive health and benefit strategies for employers based in the Greater Rocky Mountain Region. As an advisor, his intentional approach provides result-oriented strategies and sustainable solutions to manage both the quality and cost of benefits programs over the long term. Areas of specific passion and expertise include: wellness, impactful communication, employee engagement, and behavior modification.

Prior to joining CoBiz Insurance, Kallestad lead the benefit consulting firm he founded in Littleton from 1995-2004. From 1987-1995, he was a sales executive with Prudential Healthcare working with employer groups ranging in size from 50 to 2000 employees in Minneapolis, Detroit and Denver.

Kallestad holds a Bachelor’s Degree in Psychology and a CLU from The American College.

Suneil Koliwad, M.D. Ph.D.  
American Diabetes Association, Diabetes Center and Department of Medicine at the University of California San Francisco  
President of the American Diabetes Association San Francisco Bay Area Community Leadership Board, Assistant Professor

Suneil Koliwad, MD, PhD is an Assistant Professor in the Diabetes Center and Department of Medicine at The University of California San Francisco (UCSF), where he holds the Gerold Grodsky, PhD/JAB Chair in Diabetes Research. He is a board certified Endocrinologist who attends on the Diabetes and Endocrinology Services at The San Francisco General Hospital. Dr. Koliwad earned his PhD and MD degrees from Baylor College of Medicine, Houston, Texas. After completing a Chief Residency at Baylor College of Medicine and Texas Children’s Hospital, Dr. Koliwad joined UCSF to complete a clinical fellowship in Endocrinology and a research fellowship at the J. David Gladstone Institute of Cardiovascular Disease. At Gladstone, Dr. Koliwad developed his current focus on the links between dietary fats, lipid metabolic pathways, and inflammatory function in immune cells. Since starting his own laboratory in 2011, Dr. Koliwad’s research has focused on manipulating the impact of nutrient excess on inflammation in order to mitigate the development of metabolic diseases such as obesity, diabetes, heart disease, and fatty liver. He is an accomplished researcher, a frequent speaker on diabetes prevention, and is President of the American Diabetes Association San Francisco Bay Area Community Leadership Board.

Roman Kownacki, M.D.  
Kaiser Permanente  
Medical Director, Regional Occupational Health

Dr. Roman Kownacki is currently the Medical Director of Occupational Health for Northern California Kaiser Permanente. In this role he is responsible for the integration of occupational health within the Northern California Kaiser Permanente system serving healthcare needs of 3.4 million members across 19 hospital with 7,000 physicians. He leads the 30 dedicated occupational health clinics treating more than 45,000 new patients per year.

He is also the Medical Director for the Kaiser Permanente HCO that is responsible for the worker compensation care of 75,000 Kaiser Permanente Northern California employees. This includes oversight of medical management, utilization review, and case management.
Roman received his medical degree from Drexel University School of Medicine in Philadelphia, Pennsylvania. He completed his residency in Occupational Medicine at the University of Southern California, and a Masters in Public Health from UCLA. He is a past President of the Western Occupational and Environmental Association. He currently serves on the California Medical Association Workers’ Compensation Technical Advisory Committee and on the Workers Compensation Research Institute California Technical Advisory Committee.

Craig Kurtzweil  
UnitedHealth Group  
Senior Vice President, Analytic Innovations  

From 2005 to 2013, Craig joined UnitedHealthcare to begin forming a team of strategic customer analytic specialists. That team is focused on leveraging clinical, financial and consumer behavior healthcare data in a strategic customer dialog. Our overall goal is to partner with employers helping them to maintain healthcare affordability and increase their competitive advantage with a healthy and productive workforce. He services many customers himself and many more through his team. He also is responsible for the continual innovation of analytic tools nationally supporting commercial, public sector, and government programs. Those innovations focus on the ability to hot spot subsets of the population to focus on the communities in need of interventions.

Starting in 2013, Craig assumed the role of Senior VP of Analytic Innovations for UnitedHealth Group. In this role he is focused on analytic innovations, community health analytics, and complex customer support for UHG. He is leveraging the breadth of UHG’s data to create actionable insights across a wide array of audiences ranging from customers to communities to policy makers. He is focused on spreading the best practice innovations across the UHG enterprise to impact all of the members that it serves. Craig also serves as an Innovation Champion for the enterprise.

Deborah LaBonar, Ph.D.  
Aon Hewitt  
Senior Director, Absence Analytics  

Deborah is the North American Analytics leader for Aon Hewitt’s 360º Absence Solutions. With responsibility for analytic consulting and measurement, she helps employers understand their program outcomes and the associated impact to their business. She uses data analytic tools to identify clients’ key drivers of absence in order to support fully informed decision making with regards to their programs and strategies. With 15 years of experience in absence management, Deborah is an expert in call center environments with a high incidence of leaves and disability. Her skills in uncovering the organizational factors driving employee behavior have resulted in savings of 20–30% of protected and unprotected lost time. Deborah has presented her work at the annual conferences of the Disability Management Employer’s Coalition (DMEC), the National Business Group on Health (NBGH), the Integrated Benefits Institute (IBI) and the Society of Industrial Psychology (SIOP). She has also co-authored several peer reviewed journal articles and white papers, and is a recurring columnist for the DMEC @Work publication in 2015. She currently serves on the Integrated Benefits Institute (IBI) Board of Directors and Research Committee. Deborah received her master’s and doctorate degrees in industrial and organizational psychology from Purdue University in West Lafayette, Indiana.

Gene Lanzoni  
Guardian Life Insurance  
Assistant Vice President, Market & Customer Insights  

As Assistant Vice President, Market & Customer Insights for The Guardian Life Insurance Company of America, Gene Lanzoni leads research programs in support of Guardian’s primary business units and corporate functions. This includes responsibility for leading the competitive intelligence function within Guardian’s Group Insurance profit center.

Gene has nearly 30 years’ experience as a market intelligence professional as well as broad experience in the financial services industry. He previously served as Vice, Global Market Research at Prudential Financial and Vice President of Market Research, for U.S. Business at MetLife.

Gene has played an integral role in the development of industry thought leadership research programs. He launched MeLife’s long-running Employee Benefits Trends study in 2001, Prudential’s Benefits & Beyond series in 2006 and most recently, Guardian’s Workplace Benefits study which was established in 2012.
Gene is currently Vice Chair of the Group & Worksite Benefits Committee for the Life Insurance Marketing Research Association (LIMRA) and serves on research committees for the National Association of Dental Plans (NADP), and the Integrated Benefits Institute (IBI).

Gene holds a bachelors degree in Marketing and Communications from The College of New Jersey.

**Debra Lerner, Ph.D.**
Tufts Medical Center
Director, Program on Health, Work and Productivity

Dr. Lerner is a Senior Scientist within the Tufts Medical Center Institute for Clinical Research and Health Policy Studies (ICRHPS) and founder and director of the Program on Health, Work and Productivity. She is a Professor, Departments of Medicine and Psychiatry, Tufts University School of Medicine and the Sackler Graduate School of Biomedical Sciences. Dr. Lerner serves as the Director of Evaluation and Tracking for Tufts CTSI.

Dr. Lerner has dedicated her career to improving the health and wellbeing of working people and enabling them to participate fully and productively in the workplace. Dr. Lerner and her colleagues have extensive expertise in survey research and developed the Work Limitations Questionnaire (WLQ), which is used throughout the world and has become a standard of measurement. In addition, Dr. Lerner’s team has developed innovative intervention programs aimed at improving employee functional performance and work productivity. Sponsorship for this research has been provided by the National Institute on Aging, the National Institute of Mental Health and the Centers for Disease Control and Prevention.

Dr. Lerner has published numerous articles on health and productivity improvement. She has served on many scientific panels and advisory boards including the Health Project, which administers the C. Everett Koop Award to for employer excellence in workplace health promotion.

**Wendy Lynch, Ph.D.**
Lynch Consulting
Founder

For 30 years, Dr. Wendy Lynch has been making the connection between human and business performance. Her career has included roles as faculty at the University of Colorado Health Sciences Center, Vice President of Strategic Development at HCMS Group, Principal at Mercer Human Resource Consulting and on the Board of Directors for two publicly-traded companies. Now Dr. Lynch runs her own consulting firm and serves as a Fellow for the Center for Consumer Choice in Health Care at the Altarum Institute. She also holds an adjunct position of Associate Professor at IUPUI.

Dr. Lynch has applied her skills in research design and evaluation to several pivotal studies in the fields of health measurement, consumer engagement, productivity assessment and human capital management. She has consulted to dozens of Fortune 100 companies during her career. A frequent speaker, and author of over 100 articles and reports, Dr. Lynch has also published two books: Who Survives? and Aligning incentives, Information and Choice. In 2013, she was named in Forbes online one of thirteen unsung heroes changing health care forever.

Find her at www.lynchconsultingltd.com and @wendy_lynch on Twitter.

**Kimberly Mashburn**
The Hartford
Disability, Absence & Wellness Sales Consultant

Kimberly Mashburn, is Absence, Disability and Wellness Consultant at The Hartford. Kimberly is responsible for providing strategic direction, quantitative and qualitative analysis, and evaluation of absence, disability, workers compensation, wellness and productivity programs for clients in partnership with sales and account management. She brings over 25 years of experience in the fields of absence and disability management, workplace productivity, wellness and return to work strategies. Kimberly has been published in numerous trade and financial journals and has been quoted in the Wall Street Journal. She is often invited to present at national industry conferences and is a recognized thought leader in absence and productivity management.

Prior to joining The Hartford, Kimberly was Vice President at a consulting firm where she was the company’s subject matter expert for client absence and productivity. She began her career as a registered nurse and served in several hospital-based leadership positions before becoming President and CEO of a large multi-specialty medical practice. Kimberly serves on the board of directors for DMEC Atlanta Chapter and is active in the Atlanta community as chair of the 2015 Women’s Leadership Conference.
Dawn Milligan
Reynolds American, Inc.
Director, Health and Welfare Operations

Dawn Milligan is responsible for the operations and management of welfare benefit plans for 44,000 active and retiree lives. She is a CPA and prior to transitioning to corporate human resources, she worked in public accounting for 15 years.

Matt Morris, J.D.
ComPsych
VP of FMLASource

As vice president of FMLASource, Matt is responsible for ComPsych’s FMLA and ADA compliance programs. An employment lawyer by background, Matt has more than 10 years of experience working with employers’ FMLA and ADA administration.

Matt is a frequent speaker on FMLA, state leaves, the ADA and compliance challenges regarding leaves of absence. He was invited by the U.S. Department of Labor (DOL) to participate in a roundtable discussion about FMLA and authored a response to the DOL’s proposed FMLA regulations which was cited 38 times by the DOL in the final rule.

Prior to his work in FMLA administration, Matt practiced employment law representing both employees and management in employment litigation, and counseling clients on compliance with federal, state and local laws. He received his bachelor’s degree, magna cum laude, from Miami University in Oxford, Ohio and his J.D. from The University of Michigan Law School in Ann Arbor, Mich.

Firdows Muhammad
Comcast Cable and NBCUniversal
Senior Wellness Specialist

Firdows Muhammad is the Senior Wellness Specialist for the Comcast Global Benefits team. In this role, Firdows collaborates with internal and external resources to manage enterprise wide health and wellness programs across the Comcast, NBCUniversal and Spectacor business lines, and leads Los Angeles-based wellness activation.

Before starting her career with NBCUniversal as a corporate health specialist, Firdows was a Data Analyst for Anthem Blue Cross, managing contract implementation for Hospital systems including claims, contracted rate verification and trend analysis for the Neonatal Intensive Care Unit. In addition, Firdows was also responsible for supervising Sarbanes Oxley preparation for corporate and financial audits.

Firdows is a member of various local and national HR and Wellness Organizations, and was a 2013 recipient for NBCUniversal’s GEM award for exemplary behavior reflecting the company’s core values of integrity, creativity, teamwork, pioneering spirit and ownership.

Firdows received a Bachelor of Science degree in International Business from Woodbury University in Burbank, CA. Firdows is based out of Los Angeles, CA.

Rebecca Nellis
Cancer and Careers
Chief Mission Officer

Rebecca Nellis is the Chief Mission Officer for Cancer and Careers. Since 2004, she has helped evolve the organization from early concept to national prominence. Rebecca now oversees all mission-driven initiatives, including the long-term strategy and growth of Cancer and Careers’ many programs and services. As an expert on cancer-workplace issues, she travels the country speaking at national cancer conferences, leading hospitals and community events — more than 100 presentations to date — about the intersection of life, work and cancer. Rebecca also serves as spokesperson to the press, with recent interviews published in The ASCO Post, Everyday Health, NY Daily News, Women’s Health, and AOL Finance, as well as on NPR, NBC New York and CBS Salt Lake City. Prior to this position, Rebecca served as Vice President of Programs and Strategy at Cancer and Careers. Under her leadership, the organization launched its National and Regional Conferences on Work & Cancer, accredited Educational Series for Healthcare Professionals and library of Spanish-language resources. As an active member of the cancer community, she is currently on the steering committees for Workplace Transitions for People Touched by Cancer and Breast Cancer: A Story Half Told—Supporting Workplace Conversations, and has served on committees for the Livestrong Young Adult Alliance (now Critical Mass) and Stupid Cancer.

Rebecca holds a Bachelor of Fine Arts degree from New York University and a Master of Public Policy degree from Georgetown University. Her graduate thesis was entitled Implications of Cancer Survivorship on Financial Assets, Work Productivity and Employment Circumstances.
As a Board member for the Brief Intervention Group Initiative, Dr. Patel has been committed to supporting the health and wellbeing of populations. She has offered thought leadership to providers, technology teams, benefits professionals and supported the development of telemedicine solutions portfolio and business.

Focusing on health outcomes research, Dr. Patel has helped design and quantify the effectiveness of healthcare technology interventions and pilots across global functions.

Dr. Patel’s passion is in high quality, patient centric care delivery, advanced data analytics, and information technology to drive towards efficiency at the

Mr. Paul is past-President and Board member of the Employee Assistance Society of North America (EASNA) and serves as a Board member for the Brief Intervention Group Initiative.
He has authored dozens of articles on a variety of issues that impact productivity and organizational performance and co-edited the book Workplace Disaster: Preparedness, Response and Management. He often consults with Fortune 500 employers around solutions to improve employee wellbeing, resiliency and productivity and organizational performance. He has been quoted in the Wall Street Journal, Washington Post, New York Times, L.A. Times, Forbes, and Bloomberg regarding issues impacting workplace effectiveness. He is a frequent speaker on productivity and work/life issues at such venues as the National Business Group on Health, the U.S. Senate, The Institute for Health and Productivity Management, The Employee Assistance Professionals Association, EASNA, and the World Conference on Disaster Management.

He obtained his Master of Social Work from the University of Illinois, with a concentration in Occupational Social Work and Organizational Development services. He is a member of the Academy of Certified Social Workers and is a Certified Employee Assistance Professional.

Brent Pawlecki, M.D.  
The Goodyear Tire & Rubber Company  
Chief Health Officer

Dr. Brent Pawlecki is the Chief Health Officer at The Goodyear Tire & Rubber Co., a position he has held since 2011. His responsibilities in this role include global health strategy, providing leadership for Goodyear’s medical clinics, fitness facilities, health benefits, health improvement and wellness programs, Employee Assistance Programs, and health related emergencies. Prior to his current role, he was the Corporate Medical Director at Pitney Bowes, overseeing all health related issues for the organization, including the Pitney Bowes’ award winning corporate clinics, wellness programs and absence management department, and served as the Chief HIPAA Privacy Officer. During his career, he worked in a private medical practice as well as the Emergency Department. He attended college and medical school at St. Louis University and completed a combined residency in Internal Medicine and Pediatrics from Bridgeport Hospital and Yale University. He also completed the Master of Medical Management Business Degree from the University of Southern California. Dr. Pawlecki received the 2015 Global Leadership in Corporate Health Award, recognizing his career focused on developing and promoting workplace health programs. He is involved with numerous organizations, including the National Business Group on Health, NEHI-The Network for Excellence in Health Innovation, National Committee for Quality Assurance (NCQA), and the Coalition to Transform Advanced Care. His current focus works toward improvements in health quality, global health, advanced illness and end of life care.

Susan Piglia  
Ochsner Health System  
Assistant Vice President, Corporate Wellness

Susan Piglia is the Assistant Vice-President, Corporate Wellness for Ochsner Health System. In addition to managing Ochsner’s employee wellness program for over 17,000 employees, Susan is also responsible for the development and implementation of Ochsner’s Corporate Wellness and Executive Health Program to over 300 companies located in the Greater New Orleans and Baton Rouge areas. The Executive Health program provides annual physicals to approximately 3,400 executives.

Prior to joining Ochsner in 2005, she was the Regional Manager of Wellness Programs for the New Orleans office of Tenet Healthcare Corporation. Susan has a BA in Journalism from Louisiana State University.

Ochsner Health System is a non-profit, academic, multi-specialty, healthcare delivery system dedicated to patient care, research and education. The system includes eight hospitals, and over 38 health centers located throughout Southeast Louisiana. Ochsner employs more than 1,000 physicians in over 90 medical specialties and subspecialties, and conducts more than 300 clinical research trials annually. The hospital has been named in the top 50 hospitals in the nation by U.S. News & World Report in 11 specialties and named a top 100 hospital by Thomson Reuters as well as a top 15 academic medical center.

Ochsner has more than 17,000 employees system-wide.

Tom Pela  
Quest Diagnostics  
Director of Health & Wellness

Serving as the Director of Health and Wellness for Quest Diagnostics, Thomas Pela is responsible for the design, planning, communication and administration for Quests 65,000 member group health plan. Most recently, Tom managed the implementation of the Consumer Choice Benefit Plan, a full replacement consumer directed health plan. Additionally, Tom is responsible for the development and execution of the health promotion and wellness efforts within Quest Diagnostics for its over 45,000 employees, and their dependents. Innovative programming, combined with measurable results, has earned HealthyQuest considerable recognition. For more information on HealthyQuest please log on to MyHealthyQuest.com. Thomas earned a BA degree in psychology from Montclair State University, and has spent 18 years in Human Resource and Employee Benefits related roles.
Julie-Ann R. Poll has been a Senior Business Program Manager of Aetna’s Care Management and Wellness solutions and innovations since 2010. In this role, she develops strategies and business cases to launch innovative, research-based initiatives to drive optimal health and wellbeing across end-users and lower medical costs.

Previously, she held a variety of senior marketing and communications roles at Aetna and CIGNA in their health care, retirement and investments and corporate divisions.

Ms. Poll holds a Bachelor’s degree in Business with concentrations in Marketing and Business Communications from Bryant University, and is an MBA graduate from the University of Hartford.

Patricia (Pat) is Pacific Resources’ practice lead for all core benefits, including Life, Disability, Absence and Productivity, Dental and Voluntary. She is responsible for the development of strategic plans, as well as enhancing productivity solutions with some of the country’s largest employers.

Pat has more than 25 years of group insurance experience, including product development, sales and sale management, and consulting. Pat joined Pacific Resources from The Hartford, where she was the Assistant Vice President of Sales and Market Development. Prior to The Hartford, Pat worked at Sun Life, Genworth Financial, and The Phoenix. She also has a background in Training and Development and a Six Sigma Green Belt certification. Pat has served on the board for Integrated Benefits Institute and is a current Board member for the Boston chapter of Disability Management Employer Coalition (DMEC).

Tonyia (Toni) Ragland-Davis received her Bachelor of Science in Nursing from the University of South Carolina. She also obtained a Master’s in Business Administration Healthcare Management and a Master’s in Nursing both from the University of Phoenix. She has worked tirelessly for the past 10 years as the Corporate Disability Manager at Michelin North America, Inc. A strong advocate for quality care delivery and doing it right the first time, she heads the department which internally manages both personal and work related medical leaves of absence and FMLA administration. Her professional interests focus on total health of the employee, quality care delivery, ensuring compliance with required leave laws and company policies/procedures, and population health. She is an active member of the Case Management Society of America (CMSA), Disability Management Employers Coalition (DMEC), National Business Group on Health (NBGH), and others. She was recently recognized for integrating the management of work related medical leaves of absence into the centralized Michelin Disability Management Services (MDMS) department.

Eric Reisenwitz leads all service, operations and product functions within Lincoln’s Group Protection business. This includes claims solutions, financial operations, customer service, and all product development and management areas. He has more than 30 years of domestic and international experience in leading strategic, financial, sales, underwriting, marketing and general insurance operations.

Before joining Lincoln, Reisenwitz served as MetLife’s Chief Marketing and Distribution Officer in Australia. In this position, he was responsible for all product development and management, pricing, marketing, distribution, and reinsurance management for the firm’s Australian group insurance and direct market business. Prior to joining the Australian leadership team, he was VP of Institutional Insurance Product Marketing for MetLife’s U.S. business. In this role, he was responsible for all product marketing activities across the U.S. group insurance business, and served as the primary product link to the distribution organization.
Reisenwitz joined MetLife in 2006 from Aetna, where he led the firm’s disability and absence management business. Prior to that, he spent more than 20 years at CIGNA, holding several roles within group insurance operations, both domestically and internationally. He started his career as a group-insurance underwriter at CIGNA.

Reisenwitz holds a Bachelor’s Degree in Political Science and Public Administration from LaSalle University in Philadelphia.

Dan Roach
San Francisco Municipal Transportation Agency
Manager, Worker’s Compensation, Industrial Safety and Road to Fitness

Dan Roach is the Program Manager for Road to Fitness, the Wellness program for San Francisco Municipal Transportation Agency (SFMTA). Dan has managed this program for six years with SFMTA, where he also manages the workers’ compensation program.

Dan has spent a good portion of his 25+ years in the workers’ compensation industry working with health, wellness and safety programs in a variety of settings. Before joining SFMTA in 2009, Dan also worked for Kaiser Permanente and State Compensation Insurance Fund, among others.

In his current role, Dan is responsible for delivering a broad spectrum of wellness services to the employees of SFMTA, including Health Risk Assessments, nutrition counseling, orthopedic assessments and seminars, to name a few. By virtue of integrating management of the Wellness program with Workers’ Compensation and Industrial Safety, Dan brings a comprehensive perspective to matters of employee wellness and safety.

Marjory Robertson, J.D.
Sun Life Financial
AVP & Senior Counsel

Marjory is Assistant Vice President & Senior Counsel at Sun Life Financial and is responsible for advising Sun Life on all U.S. employment matters, including the Family and Medical Leave Act and the Americans with Disabilities Act. In addition to providing day-to-day legal advice, she has presented seminars at Sun Life on absence management, including employers’ obligations under FMLA and ADA. Marjory is a graduate of Dartmouth College and Boston College Law School.

Jane Ryan
Mayo Clinic
Return to Work Section Head

Jane Ryan is Return to Work Section Head with over 25 years of experience in disability management with Mayo Clinic. She was instrumental in the development of return to work practices in the organization, a program that has received national awards for best practice. Previous to working with Mayo, Ms. Ryan had several years of related disability and psychiatric case management experience in vocational and medical fields, working as a Qualified Rehabilitation Consultant (QRC) in the private rehabilitation sector, program coordinator of a pain management program, nurse therapist in both inpatient chemical dependency and psychiatric programs, and counselor in a private marriage counseling practice. Ms. Ryan is on the board of the Minnesota Chapter of Disability Management Employer Coalition (DMEC) where she is Past President and current Program Chair. She is a member of the planning committee for Impairment Without Disability, an annual, national continuing medical education conference now in its 9th year. Ms. Ryan served as a member of the US Department of Labor’s Office of Disability and Employment Policy Return to Work (RTW) Community of Practice (CoP).

Steven Serra, M.D.
Aetna Inc.
Senior Medical Director

Dr. Steven Serra is a senior medical director within the Clinical Consulting, Strategy and Analysis area of Aetna National Accounts. In this role he is responsible for working across the organization, and charged with continually refining the enterprises’ integrated health and disability value proposition. Steven also serves as the President of Coventry’s Workers’ Compensation Medical Exams of New York business.

Dr. Serra joined Aetna in 2007 with the acquisition of Schaller Anderson Healthcare where he previously served as their medical director for workers’ compensation. From 2009 to 2012 Steven supported multiple businesses under Aetna’s Emerging and New Product Business umbrella. During this time Steven also served as the western regional medical director for Aetna Disability. Prior to joining Schaller Anderson Steven served as the regional flight surgeon for United Airlines and as a medical director for DaimlerChrysler where he practiced occupational and aviation medicine for eight years.
Dr. Serra is board certified in Occupational Medicine and Board Eligible in Aerospace Medicine. He has worked as a senior aviation medical examiner for the FAA in NYC, as a certified medical review officer and is an active Fellow of the American College of Occupational & Environmental Medicine (ACOEM). Dr. Serra trained at the University of Utah where he completed his Occupational Medicine Residency (2000) and received a MPH in Occupational & Environmental Health (1999). Steven lives in Nashville where he enjoys golfing & the great outdoors, delicious southern cuisine, and listening to live country music.

Bruce Sherman, M.D.
Employers Health Coalition
Medical Director

Dr. Bruce Sherman, MD, FCCP, FACOEM, serves as Medical Director with the Ohio-based Employers Health Coalition, where he brings health management and value-based purchasing strategies to employer members. He also serves as the consulting Corporate Medical Director, for Wal-Mart Stores, Inc., wherein he supports the development of integrated, value-based health and productivity management for the organization’s associates and family members in the United States. Sherman has particular interests in the business value of health and innovative employer approaches to healthcare delivery.

Sherman an active member of the Patient-Centered Primary Care Collaborative, a multi-stakeholder initiative that advances the patient-centered medical home, where he is involved with the Center for Employer and Purchaser Engagement. He is also a member of the leadership Board for both the Integrated Benefits Institute and the Center for Health Value Innovation. A frequent speaker at national venues, he has presented workforce health management strategies to diverse audiences, and has published numerous related articles.

Sherman received his MD from New York University School of Medicine, his MA from Harvard University, and his bachelor’s degree from Brown University. He is board-certified in internal medicine and a clinical faculty member in the Department of Medicine at the Case Western Reserve University School of Medicine.

Michael Sokol, M.D.
Sanofi
Chief Wellness Officer

Dr. Mike Sokol serves as Chief Wellness Officer for Sanofi, a leading global health care and pharmaceutical company. In this role, Dr. Sokol is responsible for designing, implementing, and measuring a fully integrated health and wellness strategy for the employee population and their families. The goal is to create a culture of health by promoting a healthy work environment and providing employees with the tools and resources they need to manage their health along the entire health care continuum.

Most recently, Dr. Sokol served as the Global Corporate Medical Director at Merck, where he was responsible for leading the employee health clinics, occupational health activities, and disability management programs. In addition, he developed the company’s first comprehensive incentives-based health and wellness initiative.

Prior to Merck, Dr. Sokol held positions at Medco Health Solutions and GlaxoSmithKline. In both roles, he provided consultative support to large employers and health plans, focusing on population health and disease management, quality improvement, and value-based insurance design. He also conducted health services and outcomes research demonstrating the clinical and financial benefits of improving medication adherence.

Dr. Sokol received his undergraduate degree from Ursinus College in Collegeville, PA and his medical degree from Jefferson Medical College in Philadelphia, PA. He completed his residency in preventive medicine at the University of Maryland Medical System, where he also received his Master of Science degree from the Department of Epidemiology and Preventive Medicine.

Dr. Sokol is board-certified in Public Health and General Preventive Medicine and is a Fellow of the American College of Preventive Medicine. He also holds an academic appointment in the Department of Preventive Medicine at the Mount Sinai School of Medicine in New York.

Dr. Sokol sits on several institute boards at the National Business Group on Health. He serves on the editorial board of the journal Population Health Management and has published several original manuscripts in peer-reviewed medical journals.
**Kim Stroud**  
Manatee County Government, Florida  
Employee Benefits Division Manager  

Kim is the Employee Health Benefits Manager for Manatee County Government. She joined the Health Plan in 2007 in the role of Director of Health and Lifestyle Management and developed and managed the combined EAP and Behavioral Health Program (LAMP), and oversaw the Disease Management and Wellness Programs for the Health Plan. In 2010, Kim assumed the role of the Benefit Manager for Manatee County Government. Kim has her Masters degree in Human Development Counseling and she is a licensed Mental Health Counselor through the State of Florida. Kim has worked in Community Mental Health Programs and has managed Employee Assistance Programs (EAP) for various employers. Since 2007 she has been successful in incorporating her behavioral health training into areas related to health and productivity management and creative plan design for the self-funded insurance program. She and her Team have integrated concepts of Stages of Change and the importance of emotional wellbeing into all of the Disease Management and Wellness Programs offered by the Health Plan in efforts to continue to build a Culture of Health in Manatee County. With Kim’s leadership in conjunction with her onsite clinical team and forward thinking administrators, the integrated health plan and wellness model has a proven return on investment as Manatee County enjoys a negative trend in their health care spend. Additionally, the programs Kim oversees have received national recognition and commentary by various groups including The Wall Street Journal, Harvard Kennedy School, Pharmacy Benefit Management Institute, Institute for Health and Productivity Management, Tampa Bay Business Journal and many others.

**Leroy Thomas Jr.**  
Texas Children’s Pediatrics and Urgent Care  
Director, Central Business Office  

Leroy Thomas is the Director of the Central Business Office for Texas Children’s Pediatrics and Texas Children’s Urgent Care located in Houston Texas. Leroy is responsible for leading the Revenue Cycle and Managed Care operations for 50 Texas Children’s Pediatric Practice sites and three Urgent Care facilities. Leroy earned a BBA, Summa Cum Laude in Business Management from American Intercontinental University in Houston. Leroy’s professional career spans 14 years at Texas Children’s. The scope of his experience includes multiple Revenue Cycle roles including Manager of Payment Operations and Assistant Director of the Central Business Office. Leroy strives to achieve a positive team culture by fostering a synergistic atmosphere of both hard work and fun. Leroy and his wife, Stacy, have one child. Leroy also serves as a little league Football and Basketball Coach.

**Lisa Trepanier**  
Bemis Company, Inc.  
Director, Global Mobility & HR Administration  

Lisa Trepanier currently works for Bemis Company, Inc. as Director of Global Mobility and HR Administration. Lisa is responsible for overseeing the Global mobility function and the HR Plan Administration team. She serves as the point of contact for all inbound and outbound moves to and from the US whether that be a long-term assignment, short-term assignment or permanent hire in the US from an international Division (US Immigration Law), seeing all relocations through from start to finish. Lisa also manages outbound moves from country to country and serves as the key contact for all Expatriates around the globe providing guidance and support. In addition, Lisa establishes common HR program and benefit administration processes and procedures to ensure programs deliver a positive and effective workforce experience. Lisa is responsible for compliance for all HR programs including transferring knowledge and providing support to the HR Service Center on escalated issues. Prior to this role, Lisa served in multiple HR Manager roles within Bemis. Lisa has been with Bemis Company for over 13 years.

**Janelle Tucker**  
Tesla Motors  
Tesla Benefits Analyst  

Janelle Tucker, a Bay Area local and graduate of San Jose State University, operates as a Benefits Analyst at the fast-paced and scrappy electric vehicle manufacturing company, Tesla Motors based out of Fremont, California. In her 3 years at Tesla, Janelle has driven to match the innovation and efficiency of the Tesla vehicle into her management of the Tesla absence programs and policies. Janelle has shaped Tesla’s response to recent State and Federal legislation changes, and the efforts to make compliance, administration and company philosophy come together in sleek performance.
Kristin Tugman, Ph.D.
Prudential
VP, Health & Productivity Analytics and Consulting Practice | Group Insurance

Dr. Kristin Tugman has been in the health and productivity consulting field for over 15 years and currently heads up the Health and productivity analytics and consulting practice for Prudential group insurance products. The team is responsible for analyzing lost time for large employers and designing and implementing solutions that help them minimize absence and maximize productivity.

Kristin is a Certified Rehabilitation Counselor and a Licensed Professional Counselor. Dr. Tugman has authored several publications pertaining to the psychological aspects of disability. Her work details a specific cognitive behavioral model to assist individuals in overcoming psychological barriers that prevent a return to productivity.

Kristin continues to actively work on the research and development of techniques that assist individuals with psychiatric and other disabilities in maintaining appropriate function in the competitive work force.

Kristin graduated from Georgia State University with a Masters Degree in Rehabilitation Counseling and earned a PhD in Industrial and Organizational Psychology from Capella University.

Sander VanderWerf
Aon Hewitt
Vice President

Sander is a Vice President in Aon Hewitt’s National Absence Management Consulting Practice based in Morristown, NJ. Sander assists employer clients design paid and unpaid leave of absence programs that align with organizational goals, are compliant, and cost appropriate including: Disability, Family Medical Leave (FML), regulated paid sick time, Paid Time Off (PTO) and Return to Work programs. Initiatives that Sander leads for her clients include imbedding absence programs into total health and productivity strategies, integrating health and absence management programs, and selecting vendors to administer absence programs.

Sander has over 25 years of professional experience working with employers, insurance carriers and third party claims administrators in the areas of care management, disability, paid and unpaid leave programs and the design of integrated benefit programs. Her work helps employers to recruit and retain employees, achieve increased employee productivity, ensure compliant policies and processes, and achieve administrative efficiencies.

She has been a speaker at regional and national conferences on topics of disability, FMLA and integration. She is a licensed Health and Life producer. Sander has been quoted in major newspaper publications including the New York Times and the Houston Chronicle, and Web publication, HR Dive. In 2011 Sander co-authored a key article in CEBS’ Benefits Quarterly, Improving Workforce Productivity, It Isn’t Just About Reducing Absence.

Wendy Werve
Virgin Pulse
Chief Marketing Officer

Wendy is an accomplished marketing leader, bringing more than 20 years of experience developing, leading and executing growth-focused marketing strategies for a diverse range of technology, B2B and SaaS software companies, from startup to IPO, mid-market to $1 billion+.

She joined Virgin Pulse in 2015 as Chief Marketing Officer and is responsible for accelerating the company’s growth, expanding Virgin Pulse’s brand awareness, driving demand for the company’s personalized health, wellbeing and engagement solutions, and connecting the touch points with Virgin Pulse customers and users to ensure a consistent and positive experience.

She leads overall marketing initiatives and operations, including demand generation, field marketing, corporate communications, brand and product marketing. Prior to Virgin Pulse, Wendy served as Vice President of Global Marketing at SumTotal Systems, a leading human resources (HR) and talent management software provider, where she was responsible for elevating SumTotal’s brand and scaling the company’s global marketing strategy prior to its acquisition by Skillsoft.

She brings extensive experience implementing marketing strategies that have propelled impressive growth for a number of market leading enterprise software companies, including Metastorm (OpenText), Plateau Systems (SuccessFactors/SAP), Appian, and webMethods (Software AG), which today remains one of the most successful software IPOs in NASDAQ history.

Wendy earned a Bachelor of Arts from the Diederich College of Communication at Marquette University in Milwaukee, WI.
Dr. Wiesner obtained his medical degree from the University of Wisconsin and completed his internship and residency in Physical Medicine and Rehabilitation from Northwestern University Medical School / The Rehabilitation Institute of Chicago, in Chicago, Illinois. Following completion of his residency, he continued at Northwestern University Medical School as a faculty member and helped develop outpatient sports medicine and musculoskeletal clinics.

Dr. Wiesner is a member of the American Academy of Physical Medicine and Rehabilitation, American College of Occupational and Environmental Medicine and the California Medical Association.

Ruth Wolever, Ph.D.
Chief Scientific Officer
emindful

Ruth Wolever, PhD serves as the Chief Scientific Officer for eMindful. She is also the Vanderbilt Director of Health Coaching: Education, Research & Practice through the Osher Center for Integrative Medicine and her appointments as Associate Professor in the Department of Physical Medicine and Rehabilitation and the Department of Psychiatry in the Vanderbilt University Schools of Medicine and Nursing. She is trained as a clinical health psychologist with expertise in designing, implementing, and evaluating behavior change programs for medical patients and those at risk for chronic disease. Dr. Wolever is the Founding Research Director for Duke Integrative Medicine and a nationally recognized expert on Health and Wellness Coaching and one of the elected leaders of the National Consortium for Credentialing Health and Wellness Coaches (nchwc.org), a non-profit organization whose mission is to professionalize the field of health and wellness coaching, bringing forth national standards and a uniform job definition that will clarify best practices and allow for rigorous study. Dr. Wolever is also a national leader in the study of mindfulness-based approaches to self-regulation and lifestyle change (particularly stress and eating behaviors, binge eating, weight loss and weight loss maintenance), as well as innovative treatments for medication adherence, insomnia, tinnitus, and other stress-related disorders.
Paulette Wright
Hackensack UMC
Director Employee Population Health & Pension Strategies

Ms. Paulette Wright is the Director of Employee Population Health and Pension Strategies at Hackensack UMC in Hackensack, NJ. In her role as a benefits strategist, she leads a team that specializes in the areas of Health, Welfare, Wellbeing, and Retirement plans. She has been instrumental in designing and launching financial and wellness initiatives to the 7,600 employees at Hackensack UMC.

Having devoted more than 30 years to employee benefits in various health care organizations in New Jersey, Paulette has developed specific expertise paving the way for innovation, to enable more efficient and effective management of the Total Rewards program being delivered to the Hackensack UMC population. Most recently Paulette led the strategy to implement and deploy Hackensack UMC onsite health clinic for employees and their families. She has achieved $178 million savings on various benefits-related projects since 2010.

Paulette has been a featured speaker at the annual conference held by the American Society for Healthcare Human Resources Administration (ASHHRA), and Disability Management Employer Coalition (DMEC). She holds a Bachelor of Arts from Fairleigh Dickinson University, NJ and is currently pursuing a Master’s in Business Administration from Forbes School of Business at Ashford University.

Prior to joining Delta Air Lines in 1998, Ms. Zonakis managed the Workers’ Compensation, Disability, and Occupational Health programs for the employees of a global insurance company.

In retirement, Lynn is providing independent healthcare consulting to employers, healthcare companies, government entities, and other health industry groups. These services include strategy, design, measurement, and sourcing for health, pharmacy, clinical and care management, and health and wellbeing programs.

As a benefits professional with broad benefits experience, Ms. Zonakis is a frequent speaker at national meetings. Recent audiences have included the National Business Group on Health, The Conference Board, National Comprehensive Cancer Network, and World Health & Productivity Congress.

Ms. Zonakis is certified in occupational health and case management, and holds degrees in Psychology from Indiana University and Nursing from Emory University, Atlanta.

Lynn Zonakis
Delta Airlines (Retired)
Former Managing Director of Health Strategy and Resources

Ms. Zonakis recently retired from Delta Air Lines, where she served as Managing Director, Health Strategy & Resources from 2004-2015. She was responsible for strategy, design, and performance of Delta’s health and welfare benefits provided to Delta’s 150,000 employees, retirees, and dependents. She was also responsible for disability, absence, workers’ compensation, occupational health and EAP programs provided to Delta employees. During her fifteen years at Delta, she managed Delta’s health and welfare benefits to maximize efficiency, lower the company’s costs and provide significant value and resources for Delta employees, retirees and dependents. She is known as an innovator of employee benefit design, care management, and cancer related initiatives.

Gary Zyla
AssetMark
CFO

Gary oversees Finance and Human Resources for all the AssetMark businesses. He joined the company as CFO in 2011. Gary’s prior experience includes roles at Genworth Financial in both the Corporate and Retirement and Protection segments, where he led the Capital Management team and served as Vice President of Financial Planning & Analysis. Prior to joining Genworth, Gary was an actuary and financial analyst in New York and Washington, DC. He has Bachelor’s degrees in Math and History from the State University of New York-Binghamton and an MBA in Finance from the University of Maryland.
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