2017 IBI Annual Forum

MARCH 27-29, 2017
WESTIN ST. FRANCIS | SAN FRANCISCO
Welcome to
the 2017 IBI
Annual Forum
SAN FRANCISCO | MARCH 27–29, 2017
The Westin St. Francis—San Francisco on Union Square
335 Powell Street San Francisco, California 94102

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About IBI
Founded in 1995, the Integrated Benefits Institute (IBI) is a national, nonprofit research and educational organization focused on workforce health and productivity. IBI provides data, research, tools and engagement opportunities to help business leaders make sound investments in their employees’ health. IBI is supported by more than 1,200 member companies representing over 20 million workers.

Integrated Benefits Institute
595 Market Street, Suite 810
San Francisco, CA 94105
tel. 415 222 7280
fax. 415 222 7281
info@ibiweb.org
ibiweb.org
Dear Forum Attendee:

Welcome to the 2017 IBI Annual Forum. We are pleased to host the Forum again this year at the Westin Hotel right off Union Square in San Francisco. Enjoy our beautiful city. We have a variety of exciting new sessions, resources and events for our attendees.

This is a special—and poignant—event for me this year, as it will be my last Forum as President of IBI. Twenty-two years after IBI’s founding, I will be transitioning to President Emeritus. Chris McSwain—formerly benefits leader at Walmart, Whirlpool and Scana—will become IBI’s President on April 1. It has been my honor and privilege to work on the important issues of health, wellbeing and productivity over these two decades; to lead IBI through many changes; and to have had the opportunity to work with so many dedicated professionals. The friendships I have developed since IBI’s founding are irreplaceable.

With healthcare reform back on the table, demonstrating the value of workforce health to senior leaders has never been more important. 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.

In 2017, IBI is expanding ways to reach and engage with our members. We 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 and San Francisco to the fullest. I know it will create opportunities for you to learn, share, and grow in our common interest to improve the lives of our workforces and our businesses.

Regards,

Thomas Parry, Ph.D.
President
Integrated Benefits Institute
Thank You for Your Leadership

Thomas Parry, Ph.D!

Twenty-two years have passed and now it’s time for you to enjoy the next chapter in your life. IBI thanks you for your continuous hard work over the years and your leadership in the cause of workforce health & productivity. You have helped turn business relationships into a true community and served as a model for our members’ values. We cannot express enough gratitude for your far reaching vision as our co-founder and President! We wish you a long, happy and healthy retirement.
IBI Board of Directors
March 2017

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Senior Manager, Employer Channel Marketing

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Represented by Steven Serra, M.D.
Senior Medical Director

Aon Hewitt
Represented by Sander VanderWerf
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Director, Healthcare Quality and Performance Measures

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Director, Benefits

Comcast Corporation
Represented by Scott Daniels
Director of Disability

Health Care Service Corporation
Represented by Kevin M. Cassidy
SVP, Employer Group Sales & Client Management

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Well-being Director, IBM Americas, HR Integrated Health Services

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Reliance Standard/Matrix Absence Management
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National Practice Leader

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Represented by Kathy Spencer-Pike
VP, National Health Plans & PBM’s

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Represented by Denise Fleury
SVP, Disability and Absence Management

Standard Insurance Company
Represented by David Payne
Vice President Life and Disability Services

Sun Life Financial
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AVP, Product Management

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Represented by Leigh Stepan
Director-Benefits

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The Goodyear Tire & Rubber Company
Represented by J. Brent Pawlecki, M.D., 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
Director, Associate Services, Medical & Health Management Department

The Reed Group
Represented by Kevin Curry
Senior Vice President, National Practice Leader

UnitedHealthcare
Represented by Donald Potter
Vice President, Client Relations

UPMC WorkPartners
Represented by Andrew Yohe
Vice President

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

Willis Towers Watson
Represented by Mary Tavarozzi
National Leader—Group Benefit Practices

Zurich
Represented by John Miskel
Head of Corporate Life & Pensions

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

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Monday, March 27, 2017

10:00 – 11:15am Roosevelt Room
Honorary Brunch

Get To Know The People Behind IBI

Join IBI for a special brunch that will honor our retiring founder Dr. Thomas Parry and welcome IBI’s new President, Chris McSwain.

11:15 – 12:15pm Elizabethan Room A
Pre-conference

Harmonizing North American and Global Leaves: A Path to Success
• Rich McDonald, Johnson & Johnson, HR
• Tyler Amell, Ph.D., Morneau Shepell, Partner

Multinational and global organizations are increasingly focused on offering competitive benefit support plans to their staff. These plans enhance health and productivity, and serve to attract and retain employees. Benefit support will improve adherence to country-specific best practices and help companies better comply with local, regional and national legislation. This can be a complicated undertaking given the myriad of options and legislation within one country, let alone juggling the constraints in several countries simultaneously. Organizations need an integrated, harmonious approach in order to improve operational efficiencies and support a global mandate. This webinar session will focus on the approach to desired outcomes Johnson & Johnson has taken in order to manage leaves throughout North America, starting with the United States and Canada.

Elizabethan Room B
Pre-conference

The Effect of Herpes Zoster (Shingles) On Work Productivity
• Kelly Johnson, Ph.D., Merck & Co., Inc., Associate Director of Center for Observational and Real World Evidence—Adult Vaccine
• Virginia Peddicord, Merck & Co., Director of Global Employee Population Health

In collaboration with Optum, Merck Co. & Inc. conducted a study to determine the effect of herpes zoster (HZ) on work productivity. A cross-sectional survey was given to adult commercial health plan enrollees aged 50-64 years who had evidence of herpes zoster. The survey collected information on patients’ demographics, health status, severity and work productivity while experiencing HZ. The proportion of patients who either lost work (absenteism) or were less productive at work (presenteeism) was calculated. Overall, the findings show that patients with worse self-reported HZ severity had increasingly greater odds for absenteeism and presenteeism during their HZ episode compared to patients with self-reported very mild severity. Our session will thoroughly explore the considerable impact on the work and productivity of those suffering from HZ.
11:15 – 12:15pm  Elizabethan Room C
Pre-conference

An Employer Early Intervention in Chronic Pain and Delayed Recovery
• Denise Zoe Algire, Albertsons’ Companies, Director of Managed Care & Disability - Corporate Risk Management
• Michael Coupland, IMCS Group Inc., Network Medical Director

This presentation will outline an early intervention screening and biopsychosocial treatment intervention in workers’ compensation claims management by Albertsons Companies, one of the largest food and drug retailers in the United States. The employer’s risk management leadership identified that a percentage of employees do not recover within expected disability durations and these employees account for a disproportionate amount of overall claims costs. After exploring the literature and examining past claims reviews, Albertsons identified that psychosocial factors were predictive of longer disability durations. The employer then designed and piloted a brief biopsychosocial intervention, measured the outcomes and subsequently deployed the intervention across a full region and then nationally. The intervention demonstrated outcomes on both disability durations and medical claims costs. The opportunities and challenges of moving from pilot to full nationwide implementation will be presented.

Elizabethan Room D
Pre-conference

Opening the Door to Workplace Mental Health
• Michael Vittoria, Lifespan, Director of Benefits
• Karen English, Spring Consulting, Senior Partner
• Nazneen Vimadalal, Cigna, VP of Product Management
• Terri Rhodes, DMEC, CEO

Mental health conditions impact one in five workers. These conditions are a growing concern for employers as they impact employee productivity and absenteeism. This session will focus on the 2016 DMEC Behavioral Health Survey and focus group discussions, what employers are doing to address workplace mental health, and what this data tells us about medical costs, treatment and return to work results. We will discuss how employers are addressing workplace mental wellness and summarize data and trends from a large insurance carrier.

1:00 – 1:10pm  Grand Ballroom
2017 Forum Begins
Welcome and opening remarks by IBI President Dr. Thomas Parry.

1:10 – 2:10pm  Grand Ballroom
Plenary Session

Illness Has Costs; Health Creates Business Value
• Thomas Parry, Ph.D., Integrated Benefits Institute, President
• Brian Gifford, Ph.D., Integrated Benefits Institute, Director of Research & Measurement
• Craig Kurtzweil, Unitedhealthcare, National Vice President of Data Analytics & Innovation
• Dexter Shurney, M.D., Cummins, Inc., Chief Medical Director—Executive Director of Global Health Benefits & Wellness
• Scott Daniels, Comcast / NBCUniversal, Senior Director of Disability
• Jim Huffman, Bank of America, Senior Vice President of Global Benefits
• Dana Marie Loch, Nestle USA, Employee Wellness Manager

Researchers from IBI and other organizations have published broadly on the bottom-line impact of health—going beyond healthcare costs to include absence, disability and productivity. As employers consider the future of health benefits in their organization, it is time to address a broader and more fundamental question: to what degree can improved health positively impact top-line business operations metrics for companies? This panel of leading employers will address this topic and focus on how employers can begin to link these elements in their own organizations and who in their companies need to be involved.

2:10 – 2:20pm  Grand Ballroom
IBI Leadership Retrospective

A View from Here: Part 1
• Kevin Mead, Novo Nordisk, Director of Strategic Accounts—Employers
  *Current Board Chair
Monday, March 27, 2017  continued

2:20 – 3:20pm  Grand Ballroom  
Plenary Session  
Reimagining Pharmacy Benefits Management With Total Health & Productivity Value In Mind  
• Todd Bisping, Caterpillar, Inc., Global Benefits Manager  
• Thomas Sondergeld, Walgreens Boots Alliance, Vice President of Global Benefits & Mobility  
• Kevin Cassidy, Health Care Service Corporation, President—HCSC National Accounts  
• John Malley, Aon Hewitt, Senior Vice President of H & B Practice  
• Mark Thierer, OptumRX, Chief Executive Officer  
• Chuck Reynolds, Benfield, a division of Gallagher Benefit Services, Inc., Area President  
• Scott Thompson, Benfield, a division of Gallagher Benefit Services, Inc., Area President  

This session aims to engage employers, benefit consultants and plan & PBM vendor partners in a forward-looking discussion and debate about moving toward a total health & productivity-focused pharmacy benefit management approach. Benfield-Gallagher will lead a multi-stakeholder panel discussion about how to move away from the complex, opaque and net price-focused model that currently prevails to one that is more streamlined, transparent and focused on total health and productivity value. Panelists will discuss the objectives that should frame an employer-driven total-value-focused approach, and what moving toward such a future state would require of each stakeholder.

3:20-3:35pm  Italian & Colonial Room  
Refreshment Break  

3:35 – 3:45pm  Grand Ballroom  
IBI Leadership Retrospective  
A View from Here: Part 2  
• David North, Sedgwick CMS, President & CEO  
  *IBI Board Chair: 2001-2003  

3:45 – 4:45pm  Grand Ballroom  
Plenary Session  
Emerging Technologies to Assist an Aging Workforce  
• Robert Flynn, Xcel Energy, Directory of Safety  
• Lisa D’Ambrosio, Massachusetts Institute of Technology, Research Scientist at MITE AgeLab  
• Cynthia Hellyar, The Hartford, Director of Customer Engagement & Gerontologist  
• Mike Dunst, The Hartford, Assistant Vice President—National Practice Leader Absence Management  

While much research and attention has been focused on Millennials and the changing demographics in the workplace, not much discussion has revolved around the aging workforce. Over the next 10 years, employers will face the challenge of losing the knowledge and expertise of older and more experienced employees. How do we keep aging employees engaged, healthy and productive? Representatives from Xcel Energy, The Hartford and MIT will share their experience and research regarding the aging workforce. From self-driving cars to safer home environments, this study will highlight how the use of technology can enable an aging population to continue working productively.

5:00–5:05pm  Grand Ballroom  
Raffle Drawing Sponsored by The Hartford  

5:05–5:15pm  Grand Ballroom  
IBI Meeting of Members  

5:15 – 6:45pm  Alexandra & Victor’s Room  
Welcome Reception  
Enjoy a sweeping view of the city of San Francisco as we come together to network over cocktails and appetizers.
Tuesday, March 28, 2017

7:00am  Grand Ballroom
Breakfast Sponsored by Securian Financial Group

8:00-8:20am  Grand Ballroom
Opening Remarks and Enterprise Health Management & Performance Award Ceremony

8:20 – 8:30am  Grand Ballroom
IBI Leadership Retrospective
A View from Here: Part 3
  • Mary Tavarozzi, Willis Towers Watson, National Practice Leader—Group Benefits Practice
  *IBI Board Chair: 2004-2007

8:30 – 9:30am  Grand Ballroom
Plenary Session
There Is More to Family Leave than Just Policy
  • Eileen Fernandes, Deloitte, Bay Area Consulting Managing Director
  • Mary Chavez, Levi Strauss & Co., Global Compliance & Employee Relations Manager
  • Shannon Ellis, Patagonia, Senior Director of HR
  • Vicki Shabo, National Partnership for Women & Families, Vice President
  • Anna Steffeney, LeaveLogic, Founder & CEO—Employee Leave Solutions

This session will examine the cornerstone business cases behind paid family leave policies. In light of recent industry benchmarks, a marketplace shift to more inclusive paid family leave benefits seems possible. The panel will discuss best practices for instituting a paid family leave program, with strategies to help employers right-size their policy, programs and employee experiences. Further discussion will highlight the importance of passing a federal policy to standardize benefit coordination in the marketplace. The hope is that the conversation regarding family leave will shift from a compliance issue to a talent management strategy.

9:30-9:50am  Italian & Colonial Room
Refreshment Break Sponsored by The National Pharmaceutical Council

9:50 – 10:50am  Elizabethan Room A
Workshop A
The Impact Of A Tele-Behavioral Health Approach On Short-Term Disability
  • Janet Bruington, CarMax, Inc., Director of Benefits
  • Reena Pande, M.D., AbleTo, Chief Medical Officer
  • Steven Serra, M.D., Aetna, Senior Medical Director

This session aims to address the growing problem of untreated behavioral health issues among employees with chronic medical conditions. Medical conditions such as diabetes and chronic pain are highly prevalent in the U.S. workforce, are commonly associated with comorbid behavioral health issues, and lead to higher rates of short-term work disability, work impairment, and higher total medical costs. A multitude of barriers, including time constraints and stigma, are well recognized as reasons why employees who may benefit from behavioral healthcare do not access it. The session will highlight the experiences of a national employer to illustrate how they are increasing access to health solutions to support employees to overcome individual and system-wide barriers to optimal health. Session presenters will describe how synergistic collaboration among employer, health plan and an innovative technology-enabled behavioral healthcare provider can positively impact employee health and productivity including short-term disability claim rates by identifying, engaging and treating employees with behavioral health comorbidities.
Elizabethan Room B

Workshop B

Managing Workplace Well-being: Are You Optimizing Your EAP?

- Linda Leever, Lehigh University, Human Resources Associate
- Andrea Mander, Integrated Behavioral Health Corp., Director of Innovation Strategies & Business Relationships
- Ryan Morgan, PsyD, Integrated Behavioral Health Corp., Senior Clinical Care Manager
- Gene Lanzoni, Guardian Life, Assistant Vice President of Group & Worksite Marketing
- Judy Buczek, Guardian Life, Senior Manager of Group Disability Products

How can an Employee Assistance Program (EAP) help in decreasing absenteeism and sick leave? How can an EAP help reduce the risk of litigation? Given that many workers remain untreated for depression, why are EAPs under-communicated and under-utilized? What specific efforts to improve awareness and usage of an EAP are most effective and why? To address these and other questions, leaders from Integrated Behavioral Health and Guardian Life will be joined by Lehigh University to discuss best practices in utilizing the services of an EAP. Panelists will provide practical tips for educating HR teams, front line managers and employees about ways to recognize and address situations involving workers suffering from mental health issues. Specific communication strategies and tools to better engage workers in an EAP will be shared. These include ongoing employee communications, multi-channel delivery, educational seminars, and H.R. & manager training/support.

Elizabethan Room C

Workshop C

Cutting-Edge Scientific Research On Disability Prevention—What It Means For You

- Gary Franklin, M.D., Washington State Department of Labor & Industries; University of Washington, Medical Director, Professor
- Lee Newman, M.D., University of Colorado, Denver, Professor
- Dean Gean, M.D., Liberty Mutual Group; UC Irvine, Regional Medical Director
- Glenn Pransky, M.D., Liberty Mutual Research Institute, Director of Center for Disability Research - Occupational Medicine & Health Services Research

This session is designed to highlight current high-impact scientific research on health and productivity, and how these groundbreaking results can be implemented in the workplace. Our goal is to bring new and relevant ideas to the conference—information that’s not usually reported outside of scientific journals. We will focus on four recent scientific reports—an innovative and effective approach to curb the opioid crisis, a study that dramatically improved return to work outcomes through supervisor engagement, efforts to use e-health interventions to reduce sick leave, and surprising results from a large, objective evaluation of fitness trackers in wellness programs. For each report, an expert in the field will interpret the results and discuss implications for productivity and disability.

Elizabethan Room D

Workshop D

Increasing The Human Capital Investment—Why It Makes Sense To Invest Even MORE In Healthcare

- Sandra Morris, Principal, About Quality Benefits Design, LLC; Former Sr. Manager, US Benefits Design, Procter & Gamble
- Bruce Sherman, M.D., Xerox HR Services, Medical Director of Population Health Management

This presentation will showcase the value of looking at human capital through the same lens as other business capital. Three opportunities exist to invest more in healthcare: prevention and well-being, Centers of Excellence, and the reduction of out-of-pocket costs for prescription medicines. The impact of these three investments on direct healthcare costs as well as absence and disability will be highlighted through case studies from multiple employers.

Georgian Room

Workshop E

Workplace Transitions For People Touched by Cancer: Pilot Study Results & Employer Values

- Carole Berwick, Northrop Grumman Corporation, Director of EAP & Work/Life Solutions - Office of Global Corporate Responsibility
- Teri Herzog, Northrop Grumman Corporation, Director of Global Benefits
- Jennifer Hausman, Anthem, Inc. Program Director of Community Health Initiatives

With nearly 14.5 million cancer survivors living in the U.S., employment concerns affect the 44% of newly diagnosed cancer patients who are of “working age,” virtually all of whom are protected by the Americans with Disability Act (ADA). With $7.5 billion lost annually in productivity due to cancer-related disabilities,
continued employment allows organizations to retain valued employees and realize improvements in morale and productivity. This presentation will share how Anthem, Inc., in collaboration with Pfizer, Cancer and Careers and US Business Leadership Network, created Workplace Transitions for People Touched by Cancer, an online toolkit to help workplaces support a positive return to work experience after a cancer diagnosis.

11:10 – 12:10pm Elizabethan Room A
Workshop A
The Evolving Paid Family Benefit Landscape For Mid-Size Employers
• Alyona Richey, McDermott Will & Emery LLP, Senior Manager of Benefits
• Jennifer Higson, Redfin, Benefit Manager
• Heidi Pottgen, Aon Hewitt, Assistant Vice President of National Absence Management Practice
• Janis Moebus, Aon Hewitt, Vice President of National Absence Management Practice

Mid-sized employers face challenges when trying to meet the needs of employees who must balance work with family obligations. This presentation will describe three employers’ approaches to Maternity Leave, Paid Parental Leave, Elder Care and the way these intersect with Family Medical Leave policies. This session will describe the process involved in developing family-friendly benefits—including an exploration of scope, evaluation of the regulatory issues, actuarial estimation of costs, policy development and implementation challenges. Each employer on our panel has encountered different challenges, and there will be a lively discussion regarding how each employer approached these initiatives and the current status of their implementation.

Elizabethan Room B
Workshop B
Using Innovation To Maximize Behavioral Health Accommodations
• Margaret Nielsen, Regions Hospital, Employee Health & Wellness Lead Nurse
• Brian Kost, The Standard, Senior Director of Workplace Possibilities
• Dan Jolivet, M.D., The Standard, Director of Disabilities Medical Services
• David Setzkorn, The Standard, National Practice Leader - Absence Management

Identifying appropriate accommodations for behavioral health claims can be challenging in today’s environment due to their complexity. This difficulty, coupled with the need to comply with FMLA guidelines, often creates unique challenges for employers. Regions Hospital struggled with these challenges and turned to The Standard for help in identifying a strategy to address behavioral health claims within their hospital. The Standard helped them identify new approaches that not only addressed the accommodation requirements of ADAAA, but also had a meaningful impact on STD/FMLA durations. This session will lend insight on vocational programs and how the health system operated prior to engaging with The Standard. This will serve to offer some perspective on the evolution of the programs over the years.

Elizabethan Room C
Workshop C
Transformational Population Health Management At World Bank: Data Driven Global Initiatives
• Brian Davey, M.D., World Bank, Global Medical Director
• Ron Loeppke, M.D., U.S. Preventive Medicine, Vice Chairman

This case study will illustrate how the World Bank Group (WBG) used evidence-based data analytics and population health management (PHM) modeling tools with U.S. Preventive Medicine (USPM) to build a culturally-specific, outcome-based PHM framework to improve the health of individuals, create a transformative workplace environment and produce measureable value for WBG, staff and clients. The target population is 8,700 DC-based WBG staff members, retirees, and their dependents, as well as an additional 6,700 staff members residing in more than 100 countries. The PHM program enables an interactive experience between the patient centered medical home providers, and the WBG Travel Health and Global Wellness Clinic, and other Health Services Department units (HSD), in order to provide the WBG staff with seamless service delivery. HSD provides occupational health, safety, counseling, travel medicine and workplace wellness services, and global healthcare access support to staff in international field locations. The strategic business imperative is to create a culture of health within the WBG constituting a whole new approach to healthcare—one that focuses on managing health rather than treating illness.
11:10 – 12:10pm  
**Elizabethan Room D**  
**Workshop D**  
**Employee Advocacy Applications For Absence Management Programs**  
- Scott Daniels, Comcast / NBCUniversal, Senior Director of Disability  
- Jennifer Beckermann, Sedgwick, Vice President of Client Services  
  
Comcast provides and supports an employee advocacy model for workers’ compensation and short-term disability. An advocacy-based model improves medical outcomes; speeds return to work and reduces attorney involvement. Further, these models provide a system that protects the best interests of the employee by connecting them with someone who has medical knowledge. This liaison can then direct them to a medical provider who can provide proven, quality medical care. Under short-term disability, a fast-track process that provides employees quick approvals limits, reduces appeals and provides a better overall employee experience. Additionally, Comcast is integrating decision-making for concurrent workers’ compensation and short-term disability claims. Taken as a whole, the design of the program has resulted in decreased medical, pharmacy, absence, and workers’ compensation costs while increasing employee engagement through a streamlined, hassle-free experience.

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**Georgian Room**  
**Workshop E**  
**Transforming Healthcare Delivery In An Evolving, Consumer Driven, Digital Culture**  
- Lisa Cummings, Chesapeake Energy, Director of Total Rewards  
- Dan Sokoloff, Teladoc, Director of Advanced Healthcare Data Analytics  
  
The healthcare landscape continues to evolve as technology enables new and innovative care delivery platforms which encourage patients and providers to think differently. There’s a growing array of clinical services with the potential to offer meaningful savings to a system burdened by millions of new members entering the pool of insured, fewer PCPs and a large aging population. This presentation will distill the latest findings on how telehealth impacts the health and productivity of Chesapeake Energy, a petroleum and natural gas exploration and production company headquartered in Oklahoma City, Oklahoma. Chesapeake Energy sought to ensure employees in less populated areas had resources to receive care beyond unnecessary urgent care and emergency room visits. We will evaluate the short-term spending and resource utilization of members who used telehealth resources compared to those who chose to receive care for similar conditions in a physician’s office or ER.

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12:10 – 1:40pm  
**Italian & Colonial Room**  
**Lunch and Networking Break**  
Join attendees in the **Italian & Colonial Room** for a delicious lunch.

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1:40 – 2:40pm  
**Elizabethan Room A**  
**Workshop A**  
**ADA Analytics & Benchmarking**  
- Sonya Penner, Group Health Cooperative, Health & Wellness Manager  
- David Lea, Reliance Standard Life Insurance Company, Regional Practice Leader  
  
American With Disabilities Act (ADA) compliance is among the fastest growing concerns for employers across the country, with little objective information and guidance as to how to navigate the legal, operational and productivity implications. In 2016, Reliance Standard Life Insurance Company (Reliance Standard) and Matrix Absence Management (Matrix) unveiled the benchmarking and data analysis of employer experience related to the ADA. This statistical analysis was based on a review of more than 4,300 accommodation requests collected over a time period of at least 12 months from employers representing 120,000 employees collectively. We will present meaningful findings from the analysis itself. Presenters will discuss the implications of objective benchmark data in advancing initiatives at their own companies.
1:40 – 2:40pm  
**Elizabethan Room B**  
**Workshop B**  
**The Psychology Of Return To Work: A Qualitative Study To Improve Return To Work Outcomes**  
- Samantha Dougherty, Blue Shield of California, Supervisor of Leave of Absence Programs  
- Kristin Tugman, Ph.D., Prudential, Vice President of Health & Productivity Analytics & Consulting Practice  

In this session, Prudential and Blue Shield of California discuss the best practices surrounding how to successfully return to work after a disability. Prudential will share findings from a study that examined 5 years of short term and long term disability data to understand the thought process and psychological adjustment in a successful return to work. Blue Shield of California will discuss practical workplace best practices that capitalize on these concepts to improve return to work outcomes.

**Elizabethan Room C**  
**Workshop C**  
**The Missing Link: Measuring Medical & Pharmacy Costs Along The Disability Continuum**  
- Martha Garcia, Kaiser Permanente, Senior Program Manager  
- Katie Zaidel, ReedGroup, LLC, Data Research Scientist  
- Fraser Gaspar, Ph.D., ReedGroup, LLC, Epidemiologist  
- Kevin Curry, ReedGroup, LLC, Senior Vice President & National Practice Leader of Absence Management  
- Joe Guerriero, ReedGroup, LLC, Senior Vice President of MDGuidelines  

By analyzing millions of claims with corresponding medical and disability records across an 8-year span, ReedGroup has embarked on a research initiative to detail the costs and timing of health care relative to employee disability episodes. With these data insights, for the first time, employers are able to get a complete, detailed picture of the full cost of an employee’s disability episode—including not only costs related to wages, lost productivity, and benefits, but also medical costs that are incurred over the course of a disability duration. This session will focus on sharing data insights related disability costs and how employers can use this information to optimize employee benefits, RTW initiatives, and health/wellness programs.

**Elizabethan Room D**  
**Workshop D**  
**Sleeping For Better Mental Health: Results of a Sleep Improvement Program at The Hartford**  
- Judy Gordon, The Hartford, Wellness Director  
- Jenna Carl, PhD, Big Health, Medical Director  

Depression is the leading cause of disability worldwide and is costing employers billions in direct medical costs and lost productivity. But current solutions are reactive and vastly underutilized. During this session, Dr. Carl will discuss the connection between sleep, mental health, and productivity, and Judy Gordon from The Hartford will share how they used sleep improvement to proactively engage their workforce and improve mental health.

**Georgian Room**  
**Workshop E**  
**Breaking Down The Walls Between Employee Benefits, Workers’ Comp & Wellbeing**  
- David Zimmerman, Chairman, Tazewell County  
- Mike Miller, IPMG, Director of Integration  
- Kim Gaston, M.D., IPMG, Director of Health Management  
- Brian Devlin, IMPG, Senior Vice President of Risk Management Services  

Tazewell County, IL struggled with ever-increasing employee benefits costs as well as surprisingly high workers’ compensation claims costs. Like most employers, Tazewell maintained separate insurance coverage with benefits and workers’ compensation carriers, each with its own set of claims service teams and corresponding expenses. Tazewell also dabbled in Employee Wellness, with minimal sharing of information between the insurance carriers and the wellness provider. In many cases—especially the most challenging cases—a workplace injury wasn’t the root of the problem, rather, it was the impact of the comorbidities that contributed to longer recovery times and failed procedures. Insurance Program Managers Group (IPMG) partnered with Tazewell to pilot a new integrated model which sought to break down the silos between workers’ compensation claims handling and employee benefits claims handling. This meant one integrated claims coordinator to triage all employee events, one nurse case manager, one health management coordinator, one risk management expert, one Wellbeing platform and a single IT system that enabled coordinated services while mining the data to paint a true picture of both individual employees as well as the health and wellness of the entire workforce. Not only did this lead to dramatic behavior changes accompanied by improved health and claims costs, the seeds of culture change had been planted.
Tuesday, March 28, 2017  continued

2:40 – 2:50pm  Italian & Colonial Room

Refreshment Break

2:50 – 3:00pm  Grand Ballroom

IBI Leadership Retrospective

A View from Here: Part 4
• Daniel Lyons, Liberty Mutual Insurance Company, Senior Vice President & Manager of Employer Distribution
  *IBI Board Chair: 2007-2009

3:00 – 4:00pm  Grand Ballroom

Plenary Session

Worksite Wellness: A Vehicle to Gain Insight into Cost Drivers & Increase Productivity and Wellness
• Dan Larsen, Phase 2 Company, Safety Director
• Natalie Schwatka, Ph.D., Colorado School of Public Health, Researcher at Center for Health, Work & Environment; Instructor for the Department of Environmental & Occupational Health
• Lee Newman, M.D., University of Colorado, Denver, Professor
• Claire Brockbank, Segue Consulting, Managing Partner
• Karen Curran, Pinnacol Assurance, Director of Worksite Wellness
• Kim Jinnett, Ph.D., Integrated Benefits Institute, Executive Vice President

Pinnacol Assurance, a worker’s compensation carrier, partnered with researchers from the Colorado School of Public Health, John Hopkins, and the Integrated Benefits Institute for a five-year multidisciplinary initiative to provide a worksite wellness program through a worker’s compensation channel. The goal was to quantify the ability of a worksite-based wellness program to impact health risk factors of employers’ productivity and workers’ compensation claims and costs. This session will share the metrics and results used to evaluate the program and present lessons to help employers and suppliers understand the potential value—as well as challenges—of working through safety and risk management channels rather than the more traditional HR and health benefits arena.

4:00 – 4:15pm  Grand Ballroom

IBI Presidential Transition

5:00 – 8:00pm  RSVP Event (yacht tour)

Employer Scholarship Dinner Cruise

Guests will enjoy a dinner reception on a yacht tour on San Francisco’s Bay. This event is Sponsored by: AbbVie, Cigna, Pacific Resources Benefits Advisors, Sun Life Financial, UPMC Work Partners, Willis Towers Watson, Zurich. Note: This event is open to invited guests, staff and our scholarship sponsors.
Wednesday, March 29, 2017

7:00am  Grand Ballroom
Breakfast Sponsored by Liberty Mutual
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.

8:15 – 9:15am  Elizabethan Room A
Workshop A
Workplace Wellbeing & Business Outcomes: How Investing In Employees Can Improve The Bottom Line
• Tammy Griffin, Central Michigan University—Central Health Improvement Program, Manager of Employee Health & Wellness
• Chris Boyce, Virgin Pulse, CEO

A growing body of research supports the relationship between workplace wellbeing and business outcomes. With advances in analytical capabilities and greater program maturity, we’re gaining greater insight into the impact of wellbeing on organizational performance. Over the past several months, Central Michigan University has worked with Virgin Pulse to assess the impact it’s wellbeing program has on individual performance and organizational success. In this session, Tammy Griffin, Manager of Employee Health & Wellness at CMU, will share the results of this deep analysis, including the results of her program, impact on the organization, insights gained, and lessons learned. In addition, Virgin Pulse’s CEO, Chris Boyce, will share best practices for measuring wellbeing outcomes and portraying VOI—value on investment—to senior leadership teams, as well as insights gained from the company’s full book of business regarding productivity, health improvement, behavior change, and their links to business outcomes.

Elizabethan Room B
Workshop B
How a Wellness Program Penetrated the Silos at SMFTA
• Dan Roach, SFMTA, Manager of Workers’ Compensation & Wellness (Road to Fitness)
• Laura Chalfant, BackFirst, Development Director
• Michael K. Leary, PT, BackFirst, Program Director
• Kimberly Jinnett, Ph.D., Integrated Benefits Institute, Executive Vice President

SFMTA (Muni), the transportation agency for San Francisco, has a long history of labor versus management issues due in part to a highly unionized environment, physically challenging job requirements, as well as an increasingly hazardous workspace. This session will focus on SFMTA’s wellness initiative, Road to Fitness, which over a period of three years has worked to build a new culture of health, safety and wellness at Muni. The program has resulted in improved morale and enthusiasm and an improvement in the overall health of their employees, while also reducing workers compensation claim frequency and severity.

Elizabethan Room C
Workshop C
Mental Health In The Workplace: A Cross-Border Study With Canada & The U.S.
• Lyne Wilson, NAV Canada, Director of Talent Acquisition & Organization Health
• Alexandra Dumont, Sun Life Financial, Assistant Vice President of Productivity & Strategy
• Chris Brigham, M.D., Brigham & Associates, President
• Marie Helene Pelletier, Ph.D., Sun Life Financial, Assistant Vice President of Workplace Mental Health

According to research from the National Center for Policy Analysis, mental health is one of the two most prevalent causes and perpetuators of long-term, government-paid disability. In Canada, much like the U.S., mental health is one of the top reasons for disability claims, absenteeism, and lost productivity. In 2013, the Mental Health Commission of Canada issued a national standard for workplace mental health called Psychological Health and Safety in the Workplace. With this framework, Canadian employers have been making significant strides in addressing mental health in the workplace, often with the goal of relieving and addressing mental health issues before they warrant absences or long term leave. This panel session will convene nationally-recognized Canadian mental health expert and Sun Life AVP Dr. Marie Helene Pelletier, a Canadian employer, NAV Canada and a Sun Life Voluntary Benefits expert in the U.S who will each share their perspectives on tackling mental health issues in the workplace.
Wednesday, March 29, 2017

8:15 – 9:15am
Elizabethan D
Workshop D
**Translating Big Data To Personalized Outreach: Innovation In Proactive Mental Health Management.**
• Andrew Yohe, UPMC WorkPartners, Vice President
• Michael Parkinson, M.D., UPMC, Senior Medical Director of Health & Productivity
• Wendy Lynch, Ph.D., Lynch Consulting, Ltd., Founder

In this presentation, a representative from University of Pittsburg Medical Centers (UPMC) along with a research team will describe a unique, integrated approach to support employees, illustrating how the newest Big Data capabilities are revolutionizing the ability to tailor outreach to individual employee needs. Specifically, presenters will describe a successful approach to support employees in stressful, patient-care positions with an integrated physical and mental health program.

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9:15 – 9:45am
Georgian Room
Workshop E
**Exploring Alternative Return to Work Strategies**
• Bob Patterson, Briotix, Executive Vice President
• Tony Bohn, Norton Healthcare, Vice President of Human Resources & Chief Human Resources
• Heidi Bimrose, Unum, Worksite Solutions Director

In this session, Unum will describe how they partnered with Briotix and Norton Healthcare to introduce on-site return to work resources to supplement employer return to work programs. Briotix will share how the business case for this on-site resource was made and the initial results of the pilot program, which include reducing disability durations, containing costs, and optimizing employees' engagement.

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9:45 – 10:45am
Grand Ballroom
Plenary Session
**An Integrated Approach to Behavior Health Claims—Reducing Time Away from Work**
• Mark Tenney, Intermountain Healthcare, Director of Compensation & Benefits
• Terri Anne Flint, Ph.D., Intermountain Healthcare, Director of Employee Wellness & EAP
• Scott Roths, Willis Towers Watson, Senior Consultant
• Kimberly Mashburn, The Hartford, National Accounts Practice Lead

Since January of 2015, Intermountain Healthcare (Intermountain) has embarked on an initiative to improve the wellbeing of associates with behavioral health conditions. This multi-faceted approach includes creating a better protocol to leverage a combination of EAP, wellness programs, health plan design, education and accommodation procedures. With this initiative, Intermountain has significantly impacted the STD durations of behavioral health claims. Intermountain will provide historical points of reference and evaluate the recent steps taken to positively impact behavioral health and reduce time away from work. Discussion points will include how the internal EAP, wellness and LOA models coordinate to increase associate engagement, key EAP program differentiators and the impact of an insourced vs. third party model, health and RX plan design and utilization trending, and ADAAA program overview and sharing of examples of successful accommodations.

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10:45 – 11:15am
Grand Ballroom
Closing Remarks
Thank you for attending the 2017 IBI Forum.
Webinar 1
How Intuit Uses Technology & Year-Round Communications Get Employees Fully Engaged in Benefits

DESCRIPTION:
Intuit is a leading provider of personal finance, small business accounting, and consumer tax preparation software. Intuit has been listed among the Fortune 100 Best Companies for much of the last decade—largely because it values its 8,000 global employees as highly as its millions of customers. Intuit was an early adopter of wellness and consumer-driven plans, and for the last 10 years has continuously evolved its programs to help employees improve their health and financial security. Since 2007, Intuit’s user-centric benefits website and commitment to robust year-round education has assisted employees in using and appreciating their benefits.

Join this webinar to learn about Intuit’s success and how to apply it to your company. Jen Gentry, Intuit’s benefits program manager and Jennifer Benz, CEO of Benz Communications will cover topics including:

- Creating a multi-channel year-round communications strategy.
- Lowering barriers to access with an outside-the-firewall benefits website.
- Integrating employee feedback and user testing into your strategy.
- Taking advantage of new methods to segment and target communications.
- Applying successful U.S. strategies to a global audience.
- How Intuit’s approach lets them quickly roll out new programs, including their most recent Well Minds mindfulness launch.

Webinar 2
Drugs and Alcohol in the Workplace

DESCRIPTION:
Is your team prepared to address employees who are under the influence while on the job? Are you knowledgeable about how to best navigate situations when substance abuse issues interfere with an employee’s health and productivity? Do you understand how these issues are covered under the Americans with Disabilities Act and Family Medical Leave Act? Equally important, do your supervisors and front linemen know how to manage these sensitive situations? In this interactive session, two top employment attorneys and an employer will walk you through employer obligations under the FMLA and ADA and provide you with the best practices on how to navigate these highly emotional situations. They will share real-life case studies and offer best practices to apply in your company. You’ll also learn about mandatory employee assistance programs, implementing drug-free workplaces, and how employment laws impact your hiring policies. Finally, you’ll learn about what happens before and after an employee seeks treatment and how to handle relapses and co-morbidity conditions resulting from addiction.
List of Speakers

Denise Zoe Algire, Albertsons’ Companies, Director of Managed Care & Disability; Director of Risk Initiatives
Dr. Tyler Amell, Ph.D., Morneau Shepell, Partner
Jennifer Beckermann, Sedgwick, Vice President of Client Services
Jennifer Benz, Benz Communications, CEO and Founder
Carole Berwick, Northrop Grumman Corporation, Director of EAP & Work/Life Solutions—Office of Global Corporate Responsibility
Heidi Bimrose, Unum, Workforce Solutions Director
Todd Bisping, Caterpillar, Inc., Global Benefits Manager
Tony Bohn, Norton Healthcare, System Vice President of Human Resources & Chief Human Resources
Chris Boyce, Virgin Pulse, CEO
Dr. Chris Brigham, M.D., Brigham & Associates, President
Claire Brockbank, Segue Consulting, Managing Partner
Janet Bruington, CarMax, Inc., Director of Benefits
Judy Buczek, Guardian Life, Senior Manager of Group Disability Products
Jenna Carl, Ph.D., Big Health, Medical Director
Kevin Cassidy, Health Care Service Corporation, President—HCSC National Accounts
Laura Chalfant, BackFirst, Development Director
Mary Chavez, Levi Strauss & Co., Global Compliance & Employee Relations Manager
Michael Coupland, IMCS Group Inc., Network Medical Director
Lisa Cummings, Chesapeake Energy, Director of Total Rewards
Karen Curran, Pinnacol Assurance, Director of Worksite Wellness
Kevin Curry, ReedGroup, Ltd., Senior Vice President & National Practice Leader of Absence Management
Lisa D’Ambrosio, Massachusetts Institute of Technology, Research Scientist at MIT AgeLab
Scott Daniels, Comcast / NBCUniversal and Comcast Spectator, Senior Director of Disability
Dr. Brian Davey, M.D., World Bank, Global Medical Director
Brian Devlin, IPMG, Senior Vice President of Risk Management Services
Samantha Dougherty, Blue Shield of California, Supervisory, Leave of Absence
Alexandra Dumont, Sun Life Financial, Assistant vice President of Product & Strategy
Mike Dunst, The Hartford, Assistant Vice President & National Practice Leader Absence Management

Shannon Ellis, Patagonia, Senior Director of HR
Karen English, Spring Consulting, Senior Partner
Eileen Fernandes, Deloitte, Bay Area Consulting Managing Director
Terri Anne Flint, Ph.D., Intermountain Healthcare, Director of Employee Wellness & EAP
Robert Flynn, Xcel Energy, Director of Safety
Dr. Gary Franklin, M.D., Washington State Department of Labor & Industries; University of Washington, Medical Director, Professor
Martha Garcia, Kaiser Permanente, Senior Program Manager
Fraser Gaspar, Ph.D., ReedGroup, LLC, Epidemiologist
Dr. Kim Gaston, M.D., IPMG, Director of Health Management
Dr. Dean Gean, M.D., Liberty Mutual Group; UC Irvine, Regional Medical Director
Jennifer Gentry, Intuit, Benefits Program Manager for Americas Benefits & Global Wellness Programs
Dr. Brian Gifford, Ph.D., Integrated Benefits Institute, Director of Research and Measurement
Judy Gordon, The Hartford, Wellness Director
Tammy Griffin, Central Michigan University - Central Health Improvement Program, Manager of Employee Health & Wellness
Joe Guerriero, ReedGroup, Ltd., Senior Vice President of MDGuidelines
Jennifer Hausman, Anthem, Inc., Program Director of Community Health Initiatives
Cynthia Hellyar, The Hartford, Director of Customer Engagement & Gerontologist
Teri Herzog, Northrop Grumman Corporation, Director of Global Benefits
Jennifer Higson, Redfin, Benefits Manager
Jim Huffman, Bank of America, Senior Vice President of Global Benefits
Dr. Kim Jinnett, Ph.D., Integrated Benefits Institute, Executive Vice President
Dr. Kelly Johnson, Ph.D., Merck & Co., Inc., Associate Director, Center for Observational & Real World Evidence - Adult Vaccines
Dr. Dan Jolivet, M.D., The Standard, Director of Disabilities Medical Services
Brian Kost, The Standard, Senior Director of Workplace Possibilities
Craig Kurzweil, UnitedHealthcare, National Vice President, Data Analytics and Innovation
List of Speakers

2017 IBI Annual Forum

Gene Lanzoni, Guardian Life, Assistant Vice President Group & Worksite Marketing—Thought Leadership
Dan Larsen, Phase 2 Company, Safety Director
David Lea, Reliance Standard Life Insurance Company, Regional Practice Leader
Michael Leary, PT, BackFirst, Program Director
Linda Lefever, Lehigh University, Human Resources Associate
Dana Marie Loch, Nestle USA, Health & Welfare
Dr. Ron Loepke, M.D., U.S. Preventative Medicine, Vice Chairman
Wendy Lynch, Ph.D., Lynch Consulting, Ltd., Founder
John Malley, Aon Hewitt, National Practice Leader Pharmacy Benefit Consulting
Andrea Mander, Integrated Behavioral Health, Director of Innovation Strategies & Business Relationships
Robyn Marino, Cigna, Counsel
Kimberly Mashburn, The Hartford, National Accounts Practice Lead
Rich McDonald, Johnson & Johnson, Head of Global Welfare Benefits and Vendor Management
Eric Meyer, Dilworth Paxson, Partner
Mike Miller, IPMG, Director Integration
Janis Moebus, Aon Hewitt, Vice President of National Absence Management Practice
Ryan Morgan, PsyD, Integrated Behavioral Health, Senior Clinical Care Manager
Sandra Morris, Principal, About Quality Benefits Design, LLC; Former Sr. Manager, US Benefits Design, Procter & Gamble
Dr. Lee Newman, M.D., University of Colorado, Denver, Professor
Margaret Nielsen, Regions Hospital, Employee Health & Wellness Lead Nurse
Dr. Reena Pande, M.D., AbleTo, Chief Medical Officer
Dr. Michael Parkinson, M.D., UPMC, Senior Medical Director of Health & Productivity
Dr. Thomas Parry, Ph.D., Integrated Benefits Institute, President
Bob Patterson, Briotix, Executive Vice President
Virginia Peddicord, Merck & Co., Inc., Director, Global Employee Population Health
Dr. Marie Helene Pelletier, Ph.D., Sun Life Financial, Assistant Vice President of Workplace Mental Health
Sonya Penner, Group Health Cooperative, Health & Wellness Manager
Heidi Pottingen, Aon Hewitt, Assistant Vice President of National Absence Management Practice

Dr. Glenn Pransky, M.D., Liberty Mutual Research Institute, Director of Center for Disability Research—Occupational Medicine & Health Service Research
Chuck Reynolds, Benfield, a division of Gallagher Benefit Services, Inc., Area President
Terri Rhodes, DMEC, CEO
Alyona Richey, McDermott Will & Emery LLP, Senior Manager, Benefits
Dan Roach, SFMTA, Manager of Workers’ Compensation & Wellness (Road to Fitness)
Scott Roths, Willis Towers Watson, Senior Consultant
Natalie Schwatka, Ph.D., Colorado School of Public Health, Researcher at Center for Health, Work & Environment; Instructor for the Department of Environmental & Occupational Health
Dr. Steven Serra, M.D., Aetna, Senior Medical Director
Lorraine Serva, Iron Hill Brewery, HR Director
David Setzkorn, The Standard, National Practice Leader—Absence Management
Vicki Shabo, National Partnership for Women & Families, Vice President
Dr. Bruce Sherman, M.D., Xerox HR Services, Medical Director of Population Health Management
Dr. Dexter Shurney, M.D., Cummins, Inc., Chief Medical Director—Executive Director of Global Health Benefits & Wellness
Dan Sokoloff, Teladoc, Director of Advanced Healthcare Data Analytics
Thomas Sondergeld, Walgreens Boots Alliance, Vice President of Global Benefits & Mobility
Anna Steffeney, Leavelogic, Founder & CEO of Employee Leave Solutions
Mark Tenney, Intermountain Healthcare, Director of Benefits
Mark Thierer, OptumRX, Chief Executive Officer
Scott Thompson, Benfield, a division of Gallagher Benefit Services, Inc., Area President
Dr. Kristin Tugman, Ph.D., Prudential, Vice President of Health & Productivity Analytics & Consulting Practice
Nazneen Vimadalal, Cigna, Vice President of Product Management
Michael Vittoria, Lifespan, Director of Benefits and HR Solution Center
Lyne Wilson, NAV CANADA, Director, Talent Acquisition & Organizational Health
Andrew Yohe, UMPC WorkPartners, Vice President
Katie Zaidel, ReedGroup, LLC, Data Scientist
David Zimmerman, Tazewell County, County Board Chairman
Speaker Biographies

**Denise Zoe Algire**
Albertsons’ Companies
Director of Managed Care & Disability; Director of Risk Initiatives

Denise is the National Director of Managed Care & Disability for the combined organizations of Albertsons and Safeway Inc, one of the largest food and drug retailers in North America.

**Dr. Tyler Amell, Ph.D.**
Morneau Shepell
Partner

Dr. Tyler Amell is a Partner at Morneau Shepell. He is an occupational epidemiologist who specializes in thought leadership related to the distribution, cause, and control of injury and illness in working populations. Dr. Amell advises organizations on their needs related to strategic and integrated workplace health, as well as absence notification and management, disability management and disability prevention, workers’ compensation, strategy, process and initiative evaluation, evidence-informed decision making, mental health, musculoskeletal health, chronic disease, wellbeing programs and workplace health and safety. Another of Dr. Amell’s areas of expertise is in applied health research, and using evidence, data, and technology to make better, more informed business, and health-related decisions when it comes to strategy, funding, prevention, assessment and treatment of injured workers. He was one of a select group of international experts on the panel evaluating the Canadian Federal Government fund allocation for the Canadian Institutes of Health Healthy and Productive Work innovation initiative. Dr. Amell also serves on the Executive Board of Directors of the Canadian Association for Research on Work and Health. Dr. Amell has given seminars and presentations at over 95 national and international conferences and has authored over 35 peer-reviewed publications, as well as book chapters and technical reports for industry. He is a former instructor at the University of Calgary, University of Alberta, University of Ottawa and Queen’s University. In the past, he has also been CEO of StaffRelay, an HR focused Technology Company, Vice President of Centric Health as well as Manager of the Employee Health Services division in the City of Edmonton.

**Jennifer Beckermann**
Sedgwick
Vice President of Client Services

Ms. Beckermann is a VP in Client Services for Sedgwick in the Atlanta, Georgia office. In her current role Jennifer is responsible for managing a client services team who oversees jumbo programs including Disability, Leave and Workers’ Compensation. Jennifer has 24 years of experience in claims management. She joined Sedgwick in 1999 as a hearing representative in Worker’s Compensation, and was subsequently promoted to the supervisor of an integrated Disability and Leave program. Jennifer transitioned into Client Services in 2009, and in this program management role she has been responsible for the relationship with many of Sedgwick’s valued clients. Jennifer’s dedication has earned her the following Sedgwick awards: Focused Performer (2004); Visionary Performer (2006); and Values in Action (2010).

**Jennifer Benz**
Benz Communications
CEO and Founder

Jennifer Benz is Founder and CEO of Benz Communications, a boutique consulting and marketing firm, headquartered in San Francisco. Nationally known for her employee benefits and communications expertise, Jen has testified twice about retirement education before the Department of Labor’s ERISA Advisory Council. Workforce magazine named her an industry “Game Changer,” and the International Association of Business Communicators (IABC) and the Profit Sharing Council of America, among other leading industry organizations, have also recognized her visionary work. At Benz Communications, Jen leads a 26-member team that creates results-focused and data-driven benefits communication strategies and campaigns, including custom websites, videos, and print materials. Several Benz clients are Fortune 500 companies, with many ranked among Fortune magazine’s Top 100 Best Companies to Work For.

**Carole Berwick**
Northrop Grumman Corporation
Director of EAP & Work/Life Solutions—Office of Global Corporate Responsibility

Carole Berwick has been working for Northrop Grumman Corporation, a global security company, for over 25 years and currently serves as Corporate Director
of the Employee Assistance Program (EAP) and the Work/Life Solutions program. Carole has managed enterprise-wide EAP strategies and programs, including functional, technical and regulatory/compliance efforts globally. With more than 65,000 employees and their families, the Northrop Grumman EAP provides direct and indirect services, including legal and financial. During her career with Northrop Grumman, Carole has been instrumental in assisting to develop the Drug-Free Workplace Program, the Workplace Violence Prevention program, Sexual Harassment, Bullying and Intimidation, and several other programs and initiatives designed to enhance employees’ overall well-being and improve workplace performance and productivity. Carole Berwick has been a licensed Marriage and Family Therapist for over 35 years, and a Certified Employee Assistance Professional for 20+ years. She holds two Master’s Degrees in psychology from C.S.U.L.B. Carole is a member of the Employee Assistance Professional Association, the Employee Assistance Roundtable and several other organizations dedicated to improving the overall health and quality of life for employees and families. Prior to working for Northrop Grumman, Carole was hired as the first Drug and Alcohol Czar in the nation to work for a school district. She has presented on the topic of EAP with particular emphasis on addiction and addictive disorders around the country, and is also a caregiver with many years of experience. Recently, much of Carole’s work, and that of her team, is focused on maintaining the behavioral health of employees and their families during these rapidly changing economic times.

**Heidi Bimrose**  
**Unum**  
**Workforce Solutions Director**  
Heidi Bimrose has worked for Unum group for 16 years, where she serves as a Director in the Workforce Solutions Group. She consults with customers to address benefit concerns through analysis of the impact of lost productivity on the organization, and by designing and implementing policies and practices that impact employee health and productivity and reduce unscheduled lost time. Heidi’s experience includes experience in the Unum benefit center as a Senior Vocational Rehabilitation Consultant, as well Director of Disability Services at universities in Tennessee and Illinois. Ms. Bimrose received her B.S. and M.A. from Northern Illinois University where she majored in Rehabilitation Counseling. She is a Certified Employee Benefit Specialist (CEBS) and Certified Rehabilitation Counselor (CRC). She is a member of Disability Management Employer’s Coalition (DMEC) and the International Association of Rehabilitation Professionals (IARP) of which she has presented at both the regional and national level.

**Todd Bisping**  
**Caterpillar, Inc.**  
**Global Benefits Manager**  
Todd Bisping is the Global Benefits Manager at Caterpillar Inc. In this role he is responsible for overseeing the global strategy and initiatives for all benefits, including Caterpillar’s Total Health Strategy and Global Mobility. Todd previously has held a wide range of responsibilities in the benefits arena including strategy, plan design, administration, compliance, government and policy issues as well as the management of the Caterpillar PPO network which includes over 30 hospitals and 3,000 providers. He also has been instrumental in the development and implementation of industry leading pharmacy benefit innovations and solutions. Todd also served as the Chief Strategy Officer for the Health Transformation Alliance during its launch. Since joining Caterpillar in 1989 as part of the company’s Engineering program, he has held numerous positions with increasing responsibilities in the areas of Engineering, I/T, and Product Support. He also is certified as a 6 Sigma Blackbelt and Master Blackbelt. Bisping, a native of Linn, Kansas, graduated from Kansas State University with a bachelor’s degree in Engineering, and Bradley University with a MBA. He also has been certified as a Benefits Professional. He currently serves as Vice-Chairman of the Board of Directors for the Heartland Healthcare Coalition as well as a member of the Board of Directors for the Health Transformation Alliance. He is involved in numerous community activities in his hometown of Morton, IL.

**Tony Bohn**  
**Norton Healthcare**  
**System Vice President of Human Resources & Chief Human Resources**  
Tony Bohn was promoted to his current role in early 2010 after joining Norton Healthcare as vice president, Human Resources, in March 2009. Bohn has more than 20 years of human resources leadership experience in the health care field. He previously served as a Vice President at Baptist Hospital East, where his responsibilities included human resources, employee health, leadership training and development, payroll, workers’ compensation, employee development, labor relations and foundation functions.
Before that, Bohn was Director of Human Resources for University of Louisville Hospital; Vice President for Human Resources at Saint Joseph HealthCare Inc. in Lexington; assistant vice president, human resources, for Audubon Hospital when it was owned by a for-profit company; director, ambulatory surgery center, and manager of human resources for Caritas Health Services in Louisville; and associate director of human resources for University of Louisville Hospital. Bohn earned a Bachelor of Arts degree in business administration from Bellarmine University in Louisville and a Master of Arts degree in human resources development from Webster University in St. Louis, Mo. Bohn has served as chair of the American Red Cross Blood Services River Valley Region board of directors and on the Bellarmine University board of overseers and alumni board. He was named the 2004 HR Professional of the Year by the Kentucky Society for Human Resource Management.

Chris Boyce
Virgin Pulse
CEO

Chris Boyce is an accomplished technology entrepreneur who brings more than 20 years of consumer loyalty, enterprise, and consumer software experience to Virgin Pulse. He joined the company in 2006 as EVP, Product, Marketing, and Business Development. Soon after, Chris became Virgin Pulse’s CEO and joined the company’s board of directors. Leveraging Virgin’s philosophy that business should be a force for good, Chris’ leadership has been instrumental in guiding Virgin Pulse’s development of market-leading, technology-based products and services that help employers improve workforce health, boost employee engagement, and enhance corporate culture. Chris has a deep background in corporate and consumer loyalty programs – he was the co-founder and former VP of Business Development at Upromise, a 13 million-member online loyalty coalition and college savings account business. There, he built a business development team that now boasts the largest and most comprehensive partner coalition of any loyalty program in the U.S. Before founding Upromise, Chris founded and served as director of the health care business unit at Trilogy Development Group in Austin, Texas. Chris has an MBA from Harvard Business School.

Dr. Chris Brigham, M.D.
Brigham & Associates
President

Christopher R. Brigham, M.D., the President of Brigham & Associates, Inc., is recognized as a thought leader on human potential and dis/ability. His goal is to have us all, including those who are injured and ill, experience joyful and productive lives. He is the author of Living Abled and Healthy: Your Guide to Injury and Illness Recovery, Editor-in-Chief of the American Medical Association (AMA) Guides Newsletter and Casebook, and Senior Contributing Editor for the AMA Guides to the Evaluation of Permanent Impairment, Sixth Edition. Chris has written over two hundred and fifty peer-reviewed articles, chaired the Medical Advisory Board for the Medical Disability Advisor (Fourth Edition), and is featured in video, audio, and web-based productions. He has traveled the world and trained several thousand physicians, attorneys, claims professionals, and fact-finders. He is an accomplished professional speaker and often serves as keynote presenter with the goals of inspiring and empowering attendees.

Claire Brockbank
Segue Consulting
Managing Partner

Ms. Brockbank is a principal at Segue Consulting, a health care strategy and business development firm. Since 1996, Segue has helped international and national clients revamp their business strategies to help shape or better align with the rapidly changing health care marketplace. She is currently working with Pinnacle Assurance developing and implementing a groundbreaking initiative that offers integrated worksite wellness as part of its baseline premium to its workers’ compensation clients. Ms. Brockbank is also working with the Centers for Disease Control and multiple state governments on innovative collaborations with the private sector to promote mutually beneficial wellness strategies. Ms. Brockbank has a longstanding relationship with the National Alliance of Healthcare Purchaser Coalitions (formerly NBCH) to support and promote value-based purchasing. Prior to joining Segue Consulting, Ms. Brockbank gained her broad perspective on health care through work for the U.S. Congress and state governments, with national and local health plans, and as an executive with an employer coalition and several health care start-ups. Ms. Brockbank received an MS in Health Policy & Management from Harvard University and her undergraduate degree from Stanford University.

Janet Bruington
CarMax, Inc.
Director of Benefits

Ms. Bruington joined CarMax in 2002 as benefits manager and in 2008, was promoted to director of benefits. She is responsible for oversight of the CarMax’s benefit plan strategy and management of the company’s benefits offering. These plans include all health and wellness plans, retirement plans, life and disability, and other ancillary benefits. Ms. Bruington oversees the benefit communication strategy and is focused on building associate
education, awareness and engagement in the company’s benefit plans. Ms. Bruington has more than 20 years of experience in employee benefits. Prior to joining CarMax, she managed group health and pension plans for Westvaco Corporation. Ms. Bruington received her Bachelor of Business Administration degree from Mary Baldwin College in Staunton, VA., and her Master’s in Business Administration from Colorado State University.

Judy Buczek
Guardian Life
Senior Manager of Group Disability Products

Judy is a product development professional with over 20 years of experience in the Group Disability and Absence Management market. Her background includes a broad experience base encompassing market strategy, product development, risk management, profitability improvement, and market research.

Jenna Carl, Ph.D.
Big Health
Medical Director

Jenna R. Carl, Ph.D. is a clinical psychologist who specializes in the research and treatment of anxiety, depression, insomnia, and related difficulties in adults. Dr. Carl has authored numerous peer-reviewed publications, and has presented her research and trainings on evidence-based treatments for anxiety and depression at leading national and international conferences, such as the Association for Behavioral and Cognitive Therapies and the World Congress for Behavioral and Cognitive Therapies. As the Medical Director for Big Health, she is responsible for developing evidence-based digital programs for mental health that can be used by businesses, health plans, and direct consumers. Dr. Carl is committed to helping advance evidence-based therapies through research, training, and dissemination. She obtained her Ph.D. in clinical psychology from Boston University, with training in the Center for Anxiety and Related Disorders at Boston University, Massachusetts General Hospital/Harvard Medical School, and the VA Palo Alto Health Care System.

Kevin Cassidy
Health Care Service Corporation
President—HCSC National Accounts

Kevin Cassidy oversees employer group business for Health Care Service Corporation (HCSC), a Mutual Legal Reserve Company. HCSC operates the Blue Cross Blue Shield Plans in Illinois, Montana, New Mexico, Oklahoma and Texas. Focusing on group customers with more than 10,000 employees, the Enterprise National Accounts division supports more than three million group members and manages medical claim costs exceeding $20 billion. Cassidy leads HCSC’s employer group strategy and works closely with brokers, benefit consultants and customers to build and maintain partnerships that ensure success. Previously, he was senior vice president of Sales and Account Management for Illinois Markets. Since joining the company in 1992, Cassidy has held positions in sales, client management, government contracts and operations, including National and Labor Accounts. He holds a master’s degree in business administration from the Kellogg School of Management at Northwestern University and a bachelor’s degree in communications and economics from Illinois State University. Cassidy serves on the board of directors for Consortium Health Plans, a Blue Cross and Blue Shield-owned organization that focuses on employer needs and best practices that improve cost and quality in health care. He also serves on the ambassador board of Mercy Home for Boys & Girls in Chicago and on the board of directors of the Chicagoland Chamber of Commerce.

Laura Chalfant
BackFirst
Development Director

Laura coordinates events, classes, seminars and wellness services for Road to Fitness, a health and wellness program provided by BackFirst for the SFMTA serving Transit Operators, mechanics and administrative support staff all over San Francisco. She is responsible for developing programs to meet the needs of a diverse work group, with a special focus of increasing participation of those most at risk for chronic disease. Laura produces weekly events in the Transit Divisions and at the headquarters that are designed to encourage a first step towards improved well-being. She oversees a Healthy Living speaker series, featuring medical experts, health professionals, educators and counselors who provide practical information about how lifestyle changes have positive effects on health and wellness. She also organizes other offerings on the Road to Fitness including: nutritional cooking demonstrations, weight loss groups, walking clubs, and classes for beginners in yoga, Tai Chi and Zumba. By getting to know workers on and off the bus, in and out of the office, the team at BackFirst meets workers “where they are.” BackFirst makes it easy, convenient and relevant for participants to make a commitment to meaningful lifestyle change.
Mary Chavez  
Levi Strauss & Co.  
*Global Compliance & Employee Relations Manager*

Mary Chavez is a results-driven and experienced Human Resources professional with 15 years of experience in partnering with leadership teams and delivering compliance initiatives in various industries that range from retail, non-profit performing arts academy, business processing outsourcing and health care organizations. Mary has been with Levi Strauss & Co. for five and a half years; overseeing the company’s human resources policies and compliance strategies, which include the company’s leave of absence programs and overall operation. She has had the opportunity to work closely with global business partners throughout the organization, and takes pride in the LS&Co.’s values and ethics. Outside of work Mary enjoys watching her baby girl discover the world! And enjoys her chef husband’s culinary skills! She takes pride in the Company’s leave programs, especially the recent paid parental leave benefit that was announced and implemented as she feels these are programs will make Levi’s great again.

Michael Coupland  
IMCS Group Inc.  
*Network Medical Director*

Michael Coupland is a Registered Psychologist and Certified Rehabilitation Counselor. He co-founded three national Disability Evaluations companies that have performed over 250,000 evaluations. He is the developer of the AssessAbility Functional Medicine Evaluation and Functional Psychological Evaluation systems. He is author of the COPE with Pain program and Supervised Withdrawal of Opioids Program (SWOP) for chronic pain intervention and national practice leader for a national network of psychologists and addiction medicine providers for the COPE and SWOP programs. He is a chapter author of the AMA 6th Ed. Guidelines companion text Guides to the Evaluation of Functional Ability and author of Psychosocial Interventions for Chronic Pain Management, The International Journal of Industrial Accident Boards and Commissions; Fall 2009. He was honored in 2014 with the Top 50 People in Workers Compensation award from the SEAK organization.

Lisa Cummings  
Chesapeake Energy  
*Director of Total Rewards*

Lisa serves as Director of Total Rewards for Chesapeake Energy Corporation in Oklahoma City. She is responsible for all compensation, benefits, HRIS and payroll functions for the Fortune 500 Company. Her specialty is process improvements which result in enhanced employee experience and reduced corporate expense. Lisa joined Chesapeake in 2014. She has worked in benefits and compensation roles at a variety of Fortune 500 companies ranging from Halliburton Company to Dell Computer, Cadbury and Walmart. Lisa graduated from the University of Oklahoma with a Bachelor of Accountancy degree and a Juris Doctorate degree. Lisa is an ERISA attorney and a member of the Oklahoma Bar Association.

Karen Curran  
Pinnacol Assurance  
*Director of Worksite Wellness*

Helping businesses create healthy, safe and productive workplaces is not just a job, it’s a passion. Curran has been working in the field of workers’ compensation insurance since 1990. She began her insurance career with the State Compensation Insurance Fund of California and, later, with a direct writer of workers’ compensation and an independent agency in Arizona. She joined Pinnacol Assurance in 2000. Curran has an in-depth knowledge of workers’ compensation with experience in claims adjusting and marketing. In 2010, Curran was selected to lead Pinnacol’s fledgling Worksite Wellness Program, a first-in-the-nation workers’ compensation program that helps policyholders develop worksite wellness programs. During her tenure as Director of Worksite Wellness, the program has grown exponentially, and she is now considered a subject-matter expert in the development and engagement of wellness programs for small business. The worksite wellness program’s research continues to be profiled in peer reviewed and industry journals.

Kevin Curry  
ReedGroup, Ltd.  
*Senior Vice President & National Practice Leader of Absence Management*

Kevin Curry is responsible for driving sales across Reed Group’s absence and disability business, with emphasis on absence outsourcing. He brings more than 15 years of Integrated Absence Management and consulting experience to Reed Group. In his former position in Mercer’s Total Health Management practice, Kevin was a highly respected senior Absence Management consultant. Kevin is a frequent speaker at industry conferences in the areas of Integrated Absence and Health & Productivity.
Lisa D’Ambrosio
Massachusetts Institute of Technology
Research Scientist at MIT AgeLab

Lisa D’Ambrosio, Ph.D. is a Research Associate at the MIT AgeLab with 20 years of experience as an instructor and researcher. Her research focuses on questions around decisions that impact later life, including decision-making around financial planning and preparedness, transportation and mobility, and technology adoption. Recent work includes a study of people’s visions of themselves as they age, research on caregivers’ interest in adopting new technologies, and the challenges families face around financially preparing when a loved has Alzheimer’s disease or dementia. She is an author of and contributor to numerous peer-reviewed publications which range across a number of different disciplines and fields, reflecting the nature of the MIT AgeLab. She is a contributor to and co-editor with Dr. Joseph F. Coughlin of Aging America and Transportation: Personal Choices and Public Policy, and she taught social science research design and methods in MIT’s Systems Engineering Division. Prior to coming to MIT, Dr. D’Ambrosio was a Research Analyst at the US Department of Transportation’s (USDOT) Volpe National Transportation Systems Center. Dr. D’Ambrosio earned her Ph.D. in political science from the University of Michigan, Ann Arbor, and her A.B. from Brown University.

Scott Daniels
Comcast / NBCUniversal and Comcast Spectacor
Senior Director of Disability

Scott Daniels is the Senior Director of Disability benefits for Comcast where he oversees disability and absence management strategies, programs and initiatives across the entire enterprise. Prior to joining Comcast in February of 2015, Scott was a practicing attorney for nine years in the New York metropolitan area focusing predominantly on a wide range of disability claims and New York workers’ compensation benefits. In addition to practicing law, Scott taught several lectures on the topic of disability benefits to attorneys across the country. Scott has an undergraduate degree from The Ohio State University and received his Juris Doctorate from Touro Law Center in New York.

Dr. Brian Davey, M.D.
World Bank
Global Medical Director

Dr. Brian Davey is a South African physician with extensive experience managing healthcare in International Organizations, holding a M.D. degree from the University of the Witwatersrand, South Africa, with additional postgraduate qualifications in research physiology and occupational health. He joined the United Nations family in 1995, when he was appointed as Head of Health and Safety at the Organization for the Prohibition of Chemical Weapons (OPCW) in The Hague, Netherlands. In that position he was responsible for development and implementation of the health, safety, and medical programs which protect OPCW staff as they implement the Chemical Weapons Convention, working on hazardous chemical weapons and chemical industry sites across the globe. In January 2007, Dr. Davey was appointed as Medical Director at United Nations Headquarters in New York, where he was responsible for implementation and oversight of healthcare for UN staff system-wide. Apart from the routine management of clinical, medico-administrative, and occupational health issues, Dr. Davey coordinated the medical response to a series of crises affecting the health and safety of UN staff. These included the 2009 H1N1 influenza pandemic, the earthquake in Haiti, and a series of attacks on UN offices resulting in mass casualties amongst staff in Algeria, Afghanistan, and Nigeria. Dr. Davey is a well-known international speaker and teacher, and was twice voted best lecturer by the medical students of the Vrije Universiteit, Amsterdam for his lectures on their “Health and Peace” course. He holds a M.D. degree from the University of the Witwatersrand, South Africa, with additional postgraduate qualifications in research physiology and occupational health. Dr. Davey joined the World Bank Group as Director of the Health Services Department on 23 January, 2012, where he is responsible for the healthcare of Bank staff worldwide.
development, and risk management service delivery to the industries of healthcare, and public entity risk management. Brian has responsibility for service delivery, development, and administration to over 400 public entity clients and has served as a consultant to other pool programs. Brian has presented as a keynote speaker to national & state associations in the fields of public entity and healthcare risk management. His current position is Senior Vice President of Risk Management Services for IPMG.

Samantha Dougherty  
Blue Shield of California  
*Supervisory, Leave of Absence*

Sam Dougherty, PHR, SHRM-CP is currently the LOA supervisor for Blue Shield of California in which she and her team are responsible for coordinating all leaves as well as policy and practice for the organization’s associates. She has a BA in Social Science and graduated with honors. She has been with Blue Shield of California for 7 years and has 15 years of experience in human resources.

Alexandra Dumont  
Sun Life Financial  
*Assistant Vice President of Product & Strategy*

Alex Dumont is Assistant Vice President of Product & Strategy at Sun Life Financial, U.S., where she oversees the management and enhancement of Sun Life’s employee benefits product suite. Dumont leads development of new and existing Life Absence, Disability, Voluntary and Worksite products, as well as the attached value added services. She also drives the strategic planning process to ensure division meets 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.

Shannon Ellis  
Patagonia  
*Senior Director of HR*

Shannon Ellis oversees Patagonia’s Human Resources functions including Recruiting, Benefits, HRIS, Payroll, all North American Business Partners, and its Ventura-based Campus Services teams, which include the café, the company archives, and the current campus expansion efforts. Shannon got her start in Patagonia 22 years ago in retail, engaging directly with customers, and for the past 17 years has worked in HR, engaging directly with employees. Over the years she has been responsible for every aspect of her department’s work. For many of her years in HR, Shannon was at the core of a small team that initiated the early adoption of many of the company’s progressive work policies, including paid parental leave, traveling companion support for mothers of infants, flex time, employee cross-training, and, most recently, creation of the archives to preserve the history of the company’s documents and products. Shannon knows her company from the point of view of employees at every level, from senior executive to café staffer, and in every function from finance to operations to marketing. She is a long-term guardian of the company’s unique culture. Shannon also serves as a board member of the Camber Group (formerly the Outdoor Industry Association’s Women’s Group). She holds two bachelor’s degrees from the University of California, Santa Barbara, one in geography, the other in environmental studies. She lives in Ventura, California, with her husband Rowland Ellis, daughter Caspian and son Morgan. She loves spending time with her family, traveling, surfing, skiing, and running.
Karen English
Spring Consulting
Senior Partner
Karen Trumbull English, ARM, CPCU, ACI, AU, a Partner with Spring Consulting Group, LLC, has 20 years experience in the property/casualty, health, and welfare arenas. She provides strategic direction, analysis, and implementation expertise and routinely works with integrated disability, absence and health management programs and also alternative risk financing vehicles. Prior to Spring, Karen was a senior consultant with Watson Wyatt. Karen led the regional risk & insurance practice for a small consulting firm, held the role of Assistant Risk Manager for one of the nation’s largest banks, and was a casualty broker for two of the world’s largest insurance brokers.

Eileen Fernandes
Deloitte
Bay Area Consulting Managing Director
Eileen Fernandes is a Deloitte Consulting Principal and the Bay Area Consulting Managing Director. She is a leader in Deloitte’s Human Capital Organization Transformation and Talent practice and serves many of the global Silicon Valley technology companies. She has more than 25 years of experience in both the corporate and consulting arenas. She has experience in all areas of organizational change, change management, people management and workforce transition, and human resources strategy development and implementation for organizations undergoing mergers, acquisitions and divestitures, or organizational transformation. Eileen is a Bay Area native and has served Technology clients including: Activision Blizzard, Agilent, Applied Materials, Avaya, Cisco Systems, eBay, Electronic Arts, Genentech, Hitachi, HP, Intel, Lam Research, Motorola, Oracle, PayPal, Polycom, Salesforce.com, Sprint Nextel, Silver Lake Partners, and TPG.

Robert Flynn
Xcel Energy
Director of Safety
Robert “Bert” Flynn is the Director of Safety for Xcel Energy for more than 12,000 workers across seven states. With a diverse background in Nuclear Power, he is a Certified Safety Professional and has 24 years of experience in the utility industry, and has held several leadership positions in industrial safety and workforce strategy. Prior to joining Xcel Energy in 1993, Bert served 6 years in the U.S. Navy Nuclear Submarine program. Bert holds a Bachelor of Science degree in Business Management and serves on several boards, including Nuclear Industrial Safety and Health Association (NISHA), Minnesota Safety Council (MSC), and the Goodhue, Wabasha, and Pierce County United Way.

Dr. Gary Franklin, M.D.
Washington State Department of Labor & Industries; University of Washington
Medical Director, Professor
Dr. Franklin has served as the Medical Director of the Washington State Department of Labor and Industries (L&I) from 1988 to the present, and has more than a 25-year history of developing and administering workers’ compensation health care policy and conducting outcomes research. He is a Research Professor in the Department of Environmental and Occupational Health Sciences and in the Department of Medicine (Neurology), as well as Adjunct Research Professor in the Department of Health Services, at the University Of Washington (UW). He has served as Director or Co-Director of the NIOSH-funded ERC Occupational Health Services Research training program since its inception. Dr. Franklin is also Director of the Occupational Epidemiology and Health Outcomes Program at the UW, which is the most productive program of its kind in the U.S. This program houses and facilitates primary research as well as the secondary use of workers’ compensation data in order to improve medical care and reduce the disability related to occupational injuries and illnesses.

Because of his unique dual directorship roles, he is in a unique position to conduct meaningful policy-relevant health services research, and provide leadership in this area. Dr. Franklin’s research has focused on (1) evaluating a major quality improvement program within L&I to reduce worker disability and improve outcomes; (2) identifying predictors of long-term disability among workers with back sprain and carpal tunnel syndrome; (3) assessing the risks associated with opiate use for chronic pain; and (4) evaluating outcomes of lumbar fusion. In addition, since the epidemic of opioid deaths became apparent earlier in the decade, Dr. Franklin has...
conducted several studies related to opioid prescribing practices, has translated this research directly back into state health care policy, and is leading a statewide effort to educate physicians about best practice use of opioids for chronic non-cancer pain.

**Martha Garcia**  
*Kaiser Permanente*  
*Senior Program Manager*  
Martha Garcia leads strategic customer engagement projects for Kaiser Permanente’s Integrated Disability Management program (Kaiser Employees). 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 Employers Consortium (DMEC).

**Dr. Dean Gean, M.D.**  
*Liberty Mutual Group; UC Irvine*  
*Regional Medical Director*  
Dr. Constantine Gean is Board Certified in Occupational Medicine, is on voluntary faculty in the Department of Medicine at UC Irvine and is Regional Medical Director for Liberty Mutual. He is the lead author on two pharmacology books, *The Pocket Drug Guide* and *The Index of Prescription Drugs* and is the past president of the Western Occupational and Environmental Medicine Association (WOEMA). Dr. Gean Co-chairs the ACOEM Council on Education and Academic Affairs (COEAA) and was the recipient of the 2008 WOEMA Jean Spencer Felton Award for Excellence in Scientific Writing and also of the ACOEM 2009 President’s Award. However, perhaps coolest of all, for 18 years Dr. Gean was the backstage physician at the Academy Awards.

**Jennifer Gentry**  
*Intuit*  
*Benefits Program Manager for Americas Benefits & Global Wellness Programs*  
Jennifer Gentry is a benefits program manager for Americas Benefits & Global Wellness programs at Intuit, a leading business and financial software company that has ranked among Fortune’s 100 Best Companies to Work for the past 14 years. For the past six years, she has managed Intuit’s domestic and global benefits. She oversees global wellness programs with a focus on member experience, behavior change and Design 4 Delight principles. Most recently, she designed and implemented Intuit’s new global Well Minds program—a collection of offerings to help employees handle life’s challenges, build resilience and ease stress. Jennifer’s background in mindfulness-based practices includes training in Reiki and Search Inside Yourself (SIY), a globally recognized program that combines mind training with modern neuroscience and technology. Jennifer has a Bachelor of Science degree from the University of Delaware and 16 years of experience in human resources. She enjoys yoga, traveling and spending time with her family.
Dr. Brian Gifford, Ph.D.
Integrated Benefits Institute
Director of Research and Measurement

Brian Gifford is Director of Research for the Integrated Benefits Institute (IBI), a non-profit association. His work examines the workforce productivity implications of issues such as health risks and chronic conditions, high-deductible health plans and specialty pharmaceuticals. 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.

Judy Gordon
The Hartford
Wellness Director

Judy Gordon is the Wellness Director for The Hartford, a Fortune 500 company with more than 200 years of expertise and a leader in property and casualty insurance, group benefits and mutual. In her role, Judy was responsible for the development of The Hartford’s five-year well-being strategy called Healthy at The Hartford 2020. She manages all of the company’s wellness initiatives including programs designed to address four aspects of well-being – physical, emotional, social and financial health. She manages the company’s onsite fitness centers and activity programs, lifestyle coaching and condition management programs, nutrition and weight management services, a medical ally and second opinion program, an online sleep improvement program, and more. Judy has held this position at The Hartford for the past five years, earning the National Business Group on Health’s Best Employers for Healthy Lifestyles Platinum Award for the past three years. Prior to the role of Wellness Director, Judy held roles within the company’s corporate communications group including Director of HR Communications. In this role, she was responsible for all HR-related employee communications including the promotion of the company’s wellness programs. Judy earned a Bachelor’s degree from Boston University and is a certified IIN Health Coach.

Tammy Griffin
Central Michigan University—Central Health Improvement Program
Manager of Employee Health & Wellness

Tammy Griffin, MA, is the Manager of Employee Health & Wellness at Central Michigan University. She has been a member of the Central Health Improvement Program (CHIP) staff, a nationally recognized in-house fitness and rehabilitation program for the past 28 years. Her responsibilities include overseeing the CHIP facility and CMU Workers’ Compensation Program and coordinating the CMU employee wellness program. Ms. Griffin has 30 years of experience in developing and administering worksite wellness programs. She has been an adjunct instructor in the School of Health Sciences and has done over 300 presentations and trainings both on and off-campus. Tammy received her bachelor’s from Western Michigan University and master’s from Michigan State University.

Joe Guerriero
ReedGroup, Ltd.
Senior Vice President of 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.

Jennifer Hausman
Anthem, Inc.
Program Director of Community Health Initiatives

For more than 25 years, Jennifer Hausman has been dedicated to improving the health and well-being of the community-at-large and addressing some of the most pressing needs facing health consumers today. As a Program Director for Anthem, Inc.’s Community Health Initiatives division, Jennifer continues to channel that passion for public health by creating innovative initiatives that address priority health issues such as cancer, health disparities and vaccinations. As the lead architect of these initiatives, Jennifer partners with leading national organizations to advance state-of-the-art digital resources that fill gaps-in-care and measurably improve population health. Among these innovations is the award-winning Journey Forward® survivorship care planning mobile app and software; Self Care During Cancer Treatment mobile app; Help for Cancer Caregivers interactive web tool; Take Action for Health interactive web tool that aims to reduce chronic health disparities among African Americans; and Workplace Transitions for People Touched by Cancer that supports millions of working Americans by providing a free, user-friendly electronic toolkit that helps managers deal with...
Teri Herzog
Northrop Grumman Corporation, Director of Global Benefits

Teri Herzog is director, global benefits for Northrop Grumman Corporation, a leader in global security. In this role, she is responsible for all aspects of Northrop Grumman’s benefits strategy, design, and administration. Herzog has more than 25 years of business experience in the construction materials, financial services, oil and consulting industries. She joins Northrop Grumman from Lafarge North America, where she was the director of compensation and retirement plans with responsibility for US and Canada. Prior to Lafarge, she was director, benefits at Federal Home Loan Mortgage Corporation (Freddie Mac). Prior to Freddie Mac, Herzog served as actuary at Mobil Oil Corporation. She earned a bachelor’s degree in economics and a master’s degree in mathematics from the University of Louisville.

Jennifer Higson
Redfin, Benefits Manager

Jennifer Higson is a Benefits Manager at Redfin (www.Redfin.com)—the next-generation real estate brokerage, combining its own full-service agents with modern technology to redefine real estate in the consumer’s favor. Founded by software engineers, Redfin has the country’s #1 brokerage website and offers a host of online tools to consumers, including the Redfin Estimate. In her role Ms. Higson is responsible for overseeing the successful execution of all Benefit Programs and policies to include plan design, compliance and supporting the employee experience. She consistently evaluates, leverages, and implements HR technologies and processes in order to maximize accuracy, streamline efficiency and enhance the overall experience. Prior to joining Redfin in August 2016, Ms. Higson’s previous roles were heavily focused on supporting, managing, and developing employee programs encompassing the full employee life cycle with a strong emphasis on benefits. Ms. Higson has over 10 years of results oriented experience managing a full range of Human Resource programs, systems, policies and procedures in continuously changing environments including non-profit, manufacturing and software. Ms. Higson received her bachelor’s degree in business administration with a concentration in human resources from Western Washington University.

Jim Huffman
Bank of America, Senior Vice President of Global Benefits

Jim Huffman is the head of Benefits for Bank of America. In this role, he is responsible for the design and delivery of employee benefits for Bank of America’s workforce. This includes programs and services for employee health & wellness, retirement savings, and life management. Jim works closely with the senior management team to set the overall strategic approach for the company’s benefits, and oversees the company’s benefits innovation, product and plan design, benefits delivery, benchmarking and measurement. Jim, who joined the bank in 2003, has extensive experience in employee benefits, including health care delivery and insurance, benefits design strategy and administration of employee benefits programs. Prior to joining Bank of America, Jim held roles at Fallon Healthcare System, Dell Computer and Towers Watson consulting. Jim currently serves on a number of industry committees focused on employee healthcare and benefits, including the Board of Directors for the Integrated Benefits Institute, the ERISA Industry Committee (ERIC), the Business Roundtable’s Health & Retirement Committee, and the American Heart Association’s CEO Coordinating Committee.
**Dr. Kim Jinnett, Ph.D.**
Integrated Benefits Institute
Executive Vice President

Dr. Kimberly Jinnett is currently the Executive Vice President of the Integrated Benefits Institute (IBI) and Affiliate Faculty at the Institute for Health and Aging (IHA), University of California, San Francisco. IBI provides research, full-cost benchmarking and analysis to improve health and productivity management through the integration of employee benefits. Members include more than 1,200 employers, insurers, health care providers, brokers, third-party administrators, pharmaceuticals, consultants and others interested in health and productivity issues. Employers comprise more than 90% of IBI’s membership. IHA is the University of California’s first campus-wide organized research unit (ORU) devoted to the study of health and aging. IHA’s mission is to optimize the health and aging of individuals, communities, and society through research, education and public service in the social and behavioral sciences. Dr. Jinnett’s research centers on understanding how employers, their supplier partners and surrounding communities can best engage in efforts that support a healthier, happier and high-performing workforce, a healthier economy and, in turn, healthier and more productive communities. Previously, Dr. Jinnett was a health policy researcher at RAND and at the Department of Veterans Affairs where she conducted studies on the impact of organizational behavior, context and policies on a range of staff and patient results including staff satisfaction, turnover, treatment team functioning, staff and patient clinical and quality of life outcomes. Dr. 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. degree in sociology and health services organization and policy from the University of Michigan, Ann Arbor.

**Dr. Kelly Johnson, Ph.D.**
Merck & Co., Inc.
Associate Director, Center for Observational & Real World Evidence—Adult Vaccines

Kelly D. Johnson, Ph.D. is an Associate Director for Merck & Co. Inc.’s Center for Observational and Real World Evidence (CORE). Kelly is responsible for leading and conducting health economic analyses and outcomes research on adult vaccines, specifically the herpes zoster vaccine. Before this position, Kelly successfully completed his post-doctoral fellowship in a partnership between Temple University and Merck working in the Vaccines Outcomes Research group at Merck. He has authored several publications and has recently completed a book chapter on the history of health economics and outcome research. Kelly completed is Ph.D. in Epidemiology from the University of South Carolina’s Arnold School of Public Health, his MPH from New York Medical College School of Public Health and his BS in Biology from Georgia State University.

**Dr. Dan Jolivet, M.D.**
The Standard
Director of Disabilities Medical Services

Daniel N. Jolivet, Ph.D., is the Behavioral Health Director at The Standard, where he leads the Behavioral Health Case Manager (BHCM) team and manages the psychiatrist & psychologist Peer Consultants. He is a clinical psychologist licensed in Georgia and Oregon, and has worked in behavioral health since 1981. Prior to joining The Standard, Dan worked in Managed Behavioral Healthcare Organizations (MBHOs) for twenty years in a variety of management roles, and he was in clinical practice as a child psychologist until 2003.

**Brian Kost**
The Standard
Senior Director of Workplace Possibilities

Brian is the Workplace Possibilities Senior Director. He’s been with The Standard since 2007 and was instrumental in creating the program that exists today. As part of the Workplace Possibilities team, Brian continues to identify future enhancements for the program. In his day to day duties, he implements and coordinates several onsite programs that allow employees to get back to work more quickly and maintain productivity. He also develops and maintains the metrics that monitor companies’ successful Workplace Possibilities programs. Brian has more than 30 years of experience in vocational rehabilitation services and holds a master’s degree in career and guidance counseling. He also is a certified rehabilitation counselor and certified ergonomist.

**Craig Kurtzweil**
UnitedHealthcare
National Vice President, Data Analytics and Innovation

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 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. Beginning in 2016, Craig transitioned into UHC to focus on enhancing the role that analytics plays in our ability to support our National Account customers. These customers require a deeper and broader view of data ranging from cost and utilization data to productivity and disability exposure.

**Gene Lanzoni**
**Guardian Life**
**Assistant Vice President Group & Worksite Marketing—Thought Leadership**
Gene leads thought leadership marketing and research programs in support of Guardian’s Group & Worksite business. He has nearly 30 years’ experience as a marketing and research professional as well as broad experience in the financial services industry. He previously served as Vice President, Global Market Research at Prudential Financial and Vice President of Market Research, for U.S. Business at MetLife. 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).

**Dan Larsen**
**Phase 2 Company**
**Safety Director**
Dan Larsen, safety and health director of Phase 2 Company, has worked with employees and management in the construction industry for over 10 years. Prior to that, he had hands on experience working in the field. Being on both sides of the game has provided Dan with a unique viewpoint. Dan’s operational message is that safety must be a cooperative effort from everyone in an organization. A successful safety effort starts with people looking out for their wellbeing, and then watching out for each other, followed by the support of management. Recent changes to company safety programs have been the addition of a health and wellness. The focus on health for participating employees has been dramatic. Healthy Lifestyles are also resonating with the non-participating employees who are still positive and motivated to change their health. Dan has implemented several strategies to increase personal awareness in the work place. Two which exemplify his effort are the Virgin Pulse Health and Wellness program, and The Good, The Bad, and The Ugly safety reporting system. Helping people feel empowered to take personal responsibility for themselves and encouraging them to approach others in a safe and comfortable way, helps everyone to participate fully in a well-rounded safety system. Dan takes an active role in associations in the Denver, Colorado area. He is a member of The Associated Builders and Contractors, The Associated General Contractors, The American Society of Safety Engineers, The Construction Safety Group of Denver, and the Colorado Safety Association and the Hispanic Contractors Association.

**David Lea**
**Reliance Standard Life Insurance Company**
**Regional Practice Leader**
David Lea is a Disability and Absence Management practice leader for Reliance Standard and Matrix Absence Management in the western U.S. He is responsible for new business development and client retention for our absence business (FMLA, ADA, STD, LTD) in the region and assists our sales and account management staff in working with brokers, consultants and prospective and current clients. Dave has worked in the industry for over 30 years, primarily with a focus on disability and absence management in the national accounts market. Dave has been with Reliance Standard since 2006, and worked at other major insurance carriers prior to his current role. He lives on Bainbridge Island, WA and maintains his primary office in Seattle, WA.

**Michael Leary, PT**
**BackFirst**
**Program Director**
Michael received his post-graduate degree in Physical Therapy from the Mayo Clinic and has served as an Olympic Games trainer. He founded several Orthopedic and Sports Medicine centers in the Bay Area and frequently lectures and consults with businesses and corporations, providing workplace ergonomic solutions. In 2001, Michael initiated BackFirst, a comprehensive injury prevention and wellness program for the San Francisco MTA. He also established CCSF’s first on-site rehabilitation clinic for treatment of the employees of the SFMTA. In addition to managing on-site injury prevention and wellness programs, Michael conducted on-site clinical screens and ergonomic
assessments for over 12 years with Chevron USA. Currently, through the MTA’s Road to Fitness wellness program, Michael and his team build creative solutions to address the varied health needs of the multi-cultural workforce. Michael’s broad expertise in orthopedics and ergonomics has enabled him to assess employees efficiently and effectively to provide targeted instruction and health education. He provides weekly orthopedic consults to address employee discomfort with follow-up instruction and exercises to prevent potential work related injury claims. Michael’s leadership role at BackFirst focuses on developing strategies to reach SFMTA Transit Operators and mechanics in the field via HealthStrong, their mobile wellness vehicle. Through delivery of HRA’s, exercise programs, nutritional counseling and wellness coaching, BackFirst provides Road to Fitness services to over 6,000 employees in nine diverse locations.

**Linda Lefever**  
**Lehigh University**  
**Human Resources Associate**  
Linda Lefever has nearly thirty years of human resources experience in corporate and higher education environments. Linda joined Lehigh University in 1998 and found a home in higher education. Her areas of expertise are employee relations, performance and career management, and workplace learning and development. Linda is most interested in the interplay between employee relations and performance. In her experience, employee behavior has more impact on performance than the job description. Linda has a Bachelor’s Degree in Theater and Communication, “Skills I use every day,” she says.

**Dana Marie Loch**  
**Nestle USA**  
**Health & Welfare**  
Since 2014, Dana Loch has worked across all Nestlé Operating Companies in the United States to help plan, execute and activate employee wellness strategy at both the local and national levels. Dana works with five Wellness Specialists, each exclusively dedicated to a specific Operating Company. Prior to her current role, Dana spent four years as the Employee Benefits Manager for one of Nestlé’s Operating Companies, Nestlé Waters North America. Before joining Nestlé, Dana spent six years as an Account Manager with Pierson & Smith, a private insurance brokerage firm, where Nestlé Waters NA was one of her clients.

**Dr. Ron Loeppke, M.D.**  
**U.S. Preventative Medicine**  
**Vice Chairman**  
Ron Loeppke, M.D., MPH, FACOEM, FACP is Vice-Chairman of U.S. Preventive Medicine (USPM), and serves as co-chair of the company’s International Advisory Board. USPM provides primary, secondary and tertiary prevention services for all size employers, unions and government entities as well as directly to consumers. Dr. Loeppke has over 30 years of clinical and physician executive experience in the Occupational Health, Preventive Medicine and Medical Management arenas. He has provided over 300 presentations nationally and internationally as well as authored numerous articles and book chapters relating to employer health and productivity, workplace wellness, population health management, quality care improvement, evidence based medicine, consumer driven healthcare and innovative healthcare models. He is Board Certified in Preventive Medicine; Fellowship trained in Occupational Medicine and is a Fellow of both the American College of Occupational and Environmental Medicine (ACOEM) and the American College of Preventive Medicine (ACPM). Dr. Loeppke is past President of ACOEM and was on the Board of Directors of ACOEM for 8 years. He is also the Co-Chair of the International Occupational Medical Society Collaborative (IOMSC) a global initiative involving over 24 countries. He also served as Co-Chairman of the ACOEM Section on Health and Productivity, which reviewed research on health and productivity and best practice case studies in workplace wellness. He is also Chairman of the CDC Diabetes at Work group (www.diabetesatwork.org) as part of the Center for Disease Control and Prevention (CDC) and the National Institutes of Health (NIH) National Diabetes Education Program (ndep.nih.gov).

**Wendy Lynch, Ph.D.**  
**Lynch Consulting, Ltd.**  
**Founder**  
For over 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 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, and productivity assessment. Her current efforts focus on the application of Big Data solutions in 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.”

**John Malley**  
**Aon Hewitt**  
*National Practice Leader Pharmacy Benefit Consulting*

John J. Malley is a Senior Vice President & the National Practice Leader in Pharmacy Benefit Consulting for the Aon Hewitt Innovation Team. In his current role John heads up a team of professional subject matter experts dedicated exclusively to providing clients solutions around pharmacy benefit management strategies. Prior to joining Aon Hewitt John served as Vice President of Corporate Strategy at Express Scripts Inc. Prior to joining Express Scripts in 2010 John was the North American Pharmacy Benefit Consulting Practice Leader in Towers Watson’s (legacy Watson Wyatt) Group & Health Practice in New York City. John also served as the National Practice Leader in Pharmacy Benefit Consulting for PricewaterhouseCoopers. During his years as a national pharmacy practice leader John successfully headed up teams of pharmacists, physicians and other pharmacy subject matter experts that consulted with large employers, state plans, health plans and Taft Hartley funds on a variety of challenges they face in the management of their employee pharmacy benefit plans. Prior to his career in pharmacy benefit consulting John served as a Senior Vice President of Provider Audit & Finance for a large independent PBM. He is a frequent speaker at many industry related conferences and was a principal contributing author to The Wye River Group’s 2003 publication titled The Employers Guide to Pharmaceutical Benefits. John earned his Bachelor’s degree from Seton Hall University, and his Masters from Loyola University. At Loyola, he was nominated by the faculty and subsequently accepted into The Alpha Sigma Nu National Honor Society, an honor reserved for an elite population of students enrolled at Jesuit universities throughout the world who have repeatedly demonstrated the highest level of academic excellence, research and community leadership throughout their collegiate experience.

**Andrea Mander**  
**Integrated Behavioral Health**  
*Director of Innovation Strategies & Business Relationships*

Ms. Mander has been with IBH since 2009 and is the subject matter expert and product liaison for IBH’s WorkLifeMatters Employee Assistance Program offered through Guardian. Andrea holds a Bachelor of Science in Health Management and multiple certifications in Workplace Wellness. She provides training and education on best practices and promotion of EAP and understands the unique needs of employers and brokers to achieve optimal EAP utilization. Her expertise includes managing client relationships, EAP and wellness promotion, strategic planning and implementation, program analysis, and digital health. Ms. Mander has particular interest in the integration of behavioral health with medical care through telemedicine.

**Robyn Marino**  
**Cigna**  
*Counsel*

Robyn Marino is Senior Counsel to the Strategic Transactions legal team of Cigna Corporation. Robyn has worked extensively with U.S. and Canadian employers on their employee benefit plans and leave administration, and is a frequent speaker on FMLA and ADA leave issues. Among other things, Robyn serves on the legislative committee of the Canada Life and Health Insurance Association and the disability income legislative committee for America’s Health Insurance Plans. Prior to joining Cigna Corporation, Robyn practiced law with the law firms of Saul Ewing, LLP and McCarter & English, LLP, and clerked for the Honorable John E. Wallace of the Supreme Court of New Jersey.

**Kimberly Mashburn**  
**The Hartford**  
*National Accounts Practice Lead*

Kimberly Mashburn, is Disability, Absence and Wellness Sales 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 advised clients on key absence drivers, litigation risks, processes to improve wellbeing and productivity and reduce absence-related costs. She also facilitated the selection and integration of external vendors to
assist clients with absence, wellness, life, worker’s compensation and disability employee benefits management. She began her career as a registered nurse in an acute care hospital setting and served in several hospital-based leadership positions before becoming President and CEO of a large multi-specialty medical practice. Kimberly is a Certified Corporate Wellness Specialist (CCWS) and holds licensure in both nursing and as a Life and Health Insurance broker/consultant. She sits on the National Board of Directors of DMEC and serves as Chair for the JCI Women’s Leadership Conference held annually in Atlanta.

**Rich McDonald**  
*Johnson & Johnson*  
*Head of Global Welfare Benefits and Vendor Management*

Richard McDonald is currently the Head of Global Welfare Benefits and Vendor Management, with responsibilities for the design, development, implementation and ongoing management of Johnson & Johnson health and welfare plans and other related plans domestically and internationally. Rich has been an employee of Johnson & Johnson for over 25 years with previous experience in benefit plan design and administration at AT&T Bell Laboratories.

**Eric Meyer**  
*Dilworth Paxson*  
*Partner*

Eric B. Meyer, Esquire is a partner in the Philadelphia-based law firm of Dilworth Paxson LLP. Eric is a member of the firm’s Labor & Employment Practice Group and Chair of the #SocialMedia Practice Group. He also publishes The Employer Handbook (www.TheEmployerHandbook.com), which the ABA Journal recognizes as a top labor and employment law blog. In addition to being a frequent lecturer around the country, among other outlets, Meyer has been quoted in ABCNews.com, NBCSports.com, AMEX’s Small Business Open Forum, Inc. Magazine, Business Insurance, Entrepreneur, Mashable.com, The Wall Street Journal, and the British tabloids. Eric also serves as a volunteer mediator for the United States Equal Employment Opportunity Commission.

**Mike Miller**  
*IPMG*  
*Director Integration*

Mike Miller is the Director of IPMG’s Integrated Benefits Division as well as directing the administration of self-insured, Workers’ Compensation programs for senior care providers. Since 2002, his division has serviced Workers’ Compensation claims for senior care providers and the experience led to the formation of the Integrated Benefits Division. Mental and physical health conditions unrelated to the injury were having a tremendous impact on employee recovery, as well as the cost of WC claims. In 2014 IPMG’s Integrated Benefits Division began providing integrated claims management services to clients that self-insured both Employee Benefits and Workers’ Compensation. Mike’s passion for health and wellness at the workplace is evident in IPMG’s In-Sight program, which wraps comprehensive Employee Wellbeing programs around the Integrated Benefits model. Mike began his insurance career in 1987. Prior to joining IPMG in 2000, Mike built his experience working for a large national carrier and then one of the largest international insurance brokerages. Mike focused his efforts on industries and groups with difficult exposures, primarily long-term care.

**Janis Moebus**  
*Aon Hewitt*  
*Vice President of National Absence Management Practice*

Janis Moebus is a vice president with subject matter expertise in Absence and Disability. Although she is based in Minneapolis, MN, Janis consults across the nation. Her engagements with clients are varied – she works with clients on discrete projects as well as multi-year engagements. Janis provides expertise in policies and procedures impacting absence; the capabilities required for internal administration of disability and program oversight for employers. This requires a thorough knowledge of what vendors are capable of providing as well as how to challenge them to deliver the best to each client. Janis is a member of our disability audit team. In addition, she has knowledge of the laws and rules supporting the Family Medical Leave Act, the Americans with Disabilities Amendment Act and the various state and local laws. Janis began working in the absence and disability industry in the 1980’s, and joined Aon in 2013. Her career focus includes all aspects of absence and disability, from mainstream absence management and disability, to employee health management (case management, disease, wellness, utilization review, etc.), employee assistance programs, workers’ compensation, and other related topics. Her experience spans operations, product management, sales, and consulting. She also has an interest in regulatory compliance from lobbying to the expression of rules through products. Prior to joining Aon, Janis worked for ADP, where she was responsible for implementing the Affordable Care Act and adding a new leave of absence client platform to the product suite.
Ryan Morgan, Psy.D.
Integrated Behavioral Health
Senior Clinical Care Manager

Dr. Morgan is a Senior Clinical Care Manager with IBH since 2002. Dr. Morgan specializes in addressing critical and ongoing needs of employees and their families seeking behavioral health and employee assistance services. He is a primary Human Resources and management consultant regarding impaired employee intervention, critical incident response, conflict management, job performance, diversity issues, and return to work coordination. He is frequently invited to present to employer groups in person on topics such as Stress and Resilience, Changing Behaviors to Maximize Health, and Emotional Intelligence. Dr. Morgan also enjoys his private practice working with a diverse population.

Sandra Morris
About Quality Benefits Design, LLC
Principal (Former Sr. Manager, US Benefits Design, Procter & Gamble)

Sandra G. Morris is the owner of About Quality Benefits Design, LLC. She specializes in the promotion of employee engagement and satisfaction through the design and delivery of high-quality, value-based benefits. Sandra is a former Senior Manager of U.S. Benefits Design for The Procter & Gamble Company. Her responsibilities included the strategic development, deployment and administration of benefits for P&G’s U.S. employees and retirees. After thirteen years as a critical care nurse, nursing supervisor and nursing professor, Sandra joined Procter & Gamble in 1990 and served in several benefits management and human resources roles during her 25-year tenure. Sandra holds a Master of Science in Nursing from the University of Alabama as well as certification as a Health Coach and Human Resources Manager.

Dr. Lee Newman, M.D.
University of Colorado, Denver
Professor

Dr. Lee S. Newman is a professor, physician and health informatics entrepreneur. He is recognized internationally for his research, teaching, and consultation regarding occupational and environmental health, worksite health promotion, and health informatics. A self-described “pracademic,” Dr. Newman is a Professor of Environmental and Occupational Health in the Colorado School of Public Health at the CU Anschutz Campus, Aurora, CO, where he directs the Center for Health, Work and Environment, one of six CDC national Centers of Excellence in Total Worker Health®. He co-founded Health Links, a university initiative that certifies healthy businesses. In addition, he is founder and CMIO of Axion Health, Inc., a health informatics company, Westminster, CO. Developing and evaluating practical approaches to worksite health promotion and health protection is a focus of his research, teaching, and advising. He directs the Colorado School of Public Health’s new Certificate in Total Worker Health program for business and public health professionals, teaches graduate students, and lectures nationally and internationally. Dr. Newman received his BA in psychology from Amherst College, MA in social psychology from Cornell University, and M.D. from Vanderbilt University. After internal medicine internship and residency at Emory University, he completed pulmonary and critical care medicine fellowship at the University of Colorado. Dr. Newman has authored over 165 scientific research papers and more than 100 books, chapters, and monographs. He has served as a consultant on evidenced-based solutions in worker health to government agencies, corporations, small and medium sized enterprises and community organizations throughout his career.

Margaret Nielsen
Regions Hospital
Employee Health & Wellness Lead Nurse

Margaret Nielsen has worked at Regions Hospital-Healthpartners in St Paul MN since July 1989. She received her nursing degree from Century College in 1989, and in 2012 became certified for Occupational Health Nursing. She has worked in Employee Health and Wellness since 2006, and was promoted to Lead Employee Health Nurse 2008. In 2013 Margaret began running the return to work program, which was previously overseen by Human Resources. Margaret routinely provides compassion and care as she helps employees through difficult and challenging health issues impacting their work and their personal lives.

Dr. Reena Pande, M.D.
AbleTo
Chief Medical Officer

As Chief Medical Officer of AbleTo, Reena serves as a passionate voice for the need to bridge the gaps between medical health and behavioral health. She spearheads AbleTo’s data analytics and outcomes research. In addition to her work at AbleTo, Dr. Pande is a practicing cardiologist at Brigham and Women’s Hospital in Boston, MA and Instructor at Harvard Medical School. Reena Pande earned her undergraduate degree in Biology from Harvard University, her M.D. from Harvard Medical School, and a Master’s degree in Epidemiology from the Harvard School of Public Health. She completed her internship, residency training, and fellowship in Cardiovascular Disease and Vascular Medicine at Brigham and Women’s Hospital.
Dr. Michael Parkinson, M.D.  
UPMC  
Senior Medical Director of Health & Productivity  

Dr. Parkinson is the Senior Medical Director overseeing employer health and productivity strategies for UPMC Health Plan and WorkPartners. Mike is a Past President of the American College of Preventive Medicine, the national medical specialty society of physicians trained in and committed to disease prevention and systems-based approaches to improving health and health care. He formerly was EVP, Chief Health and Medical Officer of Lumenos, a pioneer of consumer-directed health plans and a subsidiary of Wellpoint. A retired Air Force colonel, he served as associate director of medical programs and resources in the Office of the Surgeon General where he was responsible for policy and planning for over 2 million beneficiaries, 70 facilities and a $4 billion budget. While assigned to the US Public Health Service, he provided oversight of federal programs in public health, geriatrics and preventive medicine training. He served on the Institute of Medicine Committee on NASA employee health programs, and as faculty for the 14-cities Robert Wood Johnson Foundation “Aligning Forces for Quality” project. He is a board member of the American Heart Association Great Rivers Affiliate, University of Iowa NIOSH Total Worker Health Center and the Defense Health Board Healthcare Delivery Subcommittee. Mike serves on the editorial boards of the American Journal of Preventive Medicine and the American Journal of Medical Quality. He obtained his AB from Cornell, M.D. from George Washington, family practice training at the UCLA and his MPH, preventive medicine residency and chief residency at Johns Hopkins.

Dr. Thomas Parry, Ph.D.  
Integrated Benefits Institute  
President  

Dr. Thomas Parry is President of the Integrated Benefits Institute. He directs IBI’s activities and stewards its research agenda. Before co-founding IBI, he served 11 years as Research Director at the California Workers’ Compensation Institute. His research at CWCI encompassed a wide variety of topics in workers’ compensation, including medical treatment patterns, vocational rehabilitation costs and effectiveness, legal costs and trends, medical utilization, mental stress claims, and physical therapy patterns of care. While at CWCI, Parry was engaged in some of the earliest research and analysis on 24-hour coverage and integrated benefits. Parry speaks on integrated benefits and health and productivity issues at conferences and symposia in the United States and internationally. He served for five years as research advisor to the Roadway Express Inc. Medical Board. Parry received his bachelor’s, master’s and Ph.D. degrees from the University of California, Berkeley.

Bob Patterson  
Briotix  
Executive Vice President  

Bob is the Co-Founder and EVP of Briotix Inc., a recognized global leader in injury prevention, health technology, productivity and cost containment solution provider for risk managers, workers’ compensation payers, and employers to contain costs and optimize workforce performance. As a physical therapist by trade, Bob has built upon the background and experience in occupational injury management to establish and implement best practices in the disciplines of the health sciences, occupational health, injury prevention, and occupational health management through authorship, professional advocacy, research, data analytics, and employer advocacy.

Virginia Peddicord  
Merck & Co., Inc.  
Director, Global Employee Population Health  

Virginia (Ginny) Peddicord is Director of Global Employee Population Health. Ginny is responsible for building organizational capabilities that enable Merck to implement programs and measure employee health and wellness investments. She oversees innovative and integrated programs that drive employee engagement in health and wellness. During her career with Merck, Ginny has held leadership roles in both Marketing and Sales. Ginny has an MBA from the University of Chicago where she majored in Marketing, Strategy and attended the University’s Graduate Program in Health Administration and Policy.

Dr. Marie-Hélène Pelletier, Ph.D.  
Sun Life Financial  
Assistant Vice President of Workplace Mental Health  

Throughout her career in business management and psychology, Dr. Marie-Hélène Pelletier has spearheaded a national dialogue on the crucial issue of workplace health. Her work continues to this day. As Assistant Vice-President Workplace Mental Health at Sun Life Financial, Marie-Hélène oversees the organization’s mental health strategy for its Canadian group clients. She also oversees the financial and physical health pillars of the company’s Integrated Health Solutions mandate. Born and raised in Québec City and based in Vancouver, Marie-Hélène brings a truly national perspective to her work. She also brings an inter-disciplinary approach to helping organizations and their employees thrive. She holds a Ph.D. in counseling psychology from UBC and an MBA from the UBC Sauder School of Business. With her unique background in both psychology and business, she continues to evolve business
and human resources strategies to critical new areas – most recently to the integration of financial, physical and mental health. She is a Director on the board of International Association of Applied Psychology and past chair of the Board and Director at Dress for Success Vancouver, an international non-profit organization that promotes the economic independence of women.

Sonya Penner  
**Group Health Cooperative**  
*Health & Wellness Manager*

Sonya Penner is a Director with the newest region of Kaiser Permanente, Washington. IDM is the newest area of responsibility for Sonya—adding to her experience in benefits, wellness, and HR leadership. With the robust accommodation activity in the healthcare space, Sonya sees a tight program and process, coupled with data, as they key drivers to success.

Heidi Pottgen  
**Aon Hewitt**  
*Assistant Vice President of National Absence Management Practice*

Heidi is an experienced leave, disability, and absence management professional who has assisted mid- and large-market organizations to redesign paid time off, sick pay, leave, and disability benefits, improve leave and disability administration and compliance practices, unify return-to-work and stay-at-work approaches for occupational and non-occupational disabilities, and report absence through meaningful metrics. Heidi assists with strategic initiatives to move an organization along the continuum of absence management integration to promote safety and wellbeing at work and to encourage employee engagement through a culture of shared responsibility. Heidi has a Bachelor of Science degree in communications from Ithaca College. In addition, she is currently pursuing a Master of Business Administration in Human Resources at Temple University. She is certified in disability management (CPDM), disability benefits (GBDS), leave administration (CLMS), and global benefits (IFEBP). Heidi is a credentialed member of the American Academy of Professional Coders (AAPC) and maintains licensure as an agent for life and health insurance lines along with property and casualty insurance lines.

Dr. Glenn Pransky, M.D.  
**Liberty Mutual Research Institute**  
*Director of Center for Disability Research—Occupational Medicine & Health Service Research*

Dr. Pransky has directed the Center for Disability Research at the Liberty Mutual Research Institute for Safety since 1999. His research group conducts scientific investigations on disability prevention strategies, enhancing recovery in musculoskeletal disorders, work disability in older workers, and methods to achieve safe and sustained return to work. He is an associate professor in the Department of Family Medicine and Community Health at the University Of Massachusetts Medical School and a Visiting Lecturer at the Harvard School of Public Health and the University Of Massachusetts/Lowell. Prior to joining Liberty Mutual, he directed the Occupational and Environmental Health Program at the University of Massachusetts, overseeing research activities and training in occupational health. In 1995, he was a Visiting Scholar at the Agency for Health Care Policy and Research, Washington, DC, focusing on health services research. He has produced more than 120 peer-reviewed scientific publications and book chapters, and frequently presents at international scientific conferences. Dr. Pransky received his M.D. from Tufts School of Medicine, and a MS in occupational health from the Harvard School of Public Health, and is board-certified in occupational medicine and internal medicine. He is an active member of the American College of Occupational and Environmental Medicine, the National Academy of Social Insurance, and is Chairman of the Work Disability Prevention Scientific Committee of the International Commission on Occupational Health. He received the NIOSH Innovative Research Award in 2008, the American College of Occupational Medicine’s Keogh Award for Academic Excellence in 2009, and Royal Society of Medicine’s Osler Medal in 2011, and the ACOEM Health Excellence Award in 2015. He is a senior editor for the Journal of Occupational Rehabilitation.

Chuck Reynolds  
**Benfield, a division of Gallagher Benefit Services, Inc.**  
*Area President*

Chuck Reynolds is an Area President for Benfield, a Division of Gallagher Benefit Services, Inc. Chuck works with large employers, providing research and strategic communications for executive-level education and reporting on health and human capital strategy, as well as employee-focused human capital communications. Chuck also provides healthcare clients with employer-focused customer and market research, strategy, tactical planning, and implementation of programs and communications that help establish and fortify their corporate position and product/
service value proposition. Chuck holds a Bachelor of Science from the University of Wisconsin at Lacrosse and a Master of Science from American University.

Terri Rhodes
DMEC
CEO
Terri is the Chief Executive Officer of DMEC. Terri has extensive experience in all aspects of Absence and Disability Program Management and is responsible for strategic oversight and management of DMEC. Prior to joining DMEC, Terri was an Absence and Disability Management Consultant for Mercer delivering strategic absence and disability management solutions to clients of all sizes, Director of Absence and Disability for Health Net and Corporate IDM Program Manager for Abbott Laboratories. Terri holds an MBA (Business Management) a Certified Professional in Disability Management (CPDM) and a Certified Case Management Professional (CCMP) from the Insurance Educational Association and Certified Leave Management Specialist (CLMS). Terri has spoken at many national industry conferences on absence and disability program implementation and administration. She is a contributing author to several publications as well as a contributor to the new CLMS curriculum.

Alyona Richey
McDermott Will & Emery LLP
Senior Manager, Benefits
Alyona Richey is a Senior Manager of Benefits at McDermott Will & Emery LLP, an international law firm with over 1000 attorneys. Alyona has over 10 years of experience in health & welfare and retirement plans. She holds a B.S. degree in Marketing and MBA in Finance and is a member of the International Foundation of Employee Benefits. She received Group Benefits Associate designation from the International Foundation of Employee Benefits.

Dan Roach
SFMTA
Manager of Workers’ Compensation & Wellness (Road to Fitness)
Dan Roach works at the San Francisco Municipal Transportation Agency (SFMTA) as the Manager of both the Workers’ Compensation Program and the Road to Fitness Wellness Program. With over 25 years of experience in the workers’ compensation arena including self-insured, insurance and third party administration, Dan brings an in-depth perspective to employer workers’ compensation issues. More recently, he was tasked with the development and management of an in-house wellness program for SFMTA, from start to finish. By virtue of his research and development, as well as overlapping experience, Dan implemented a full service wellness program noted for relevant experiences and personal guidance for the participants.

Scott Roths
Willis Towers Watson
Senior Consultant
Scott Roths is a senior consultant at Willis Towers Watson specializing in absence, disability management and life insurance. He has over 16 years of experience advising employers in the design, funding, integration and administration of time-off work and income replacement benefit programs. Scott has served as a strategic advisor to many leading group life and disability insurance carriers. As part of carrier consulting practices at several professional service firms Scott served as a trusted audit partner and an advisor in the subject area of disability claim risk management. Scott holds a B.S. degree in finance from The University of Illinois at Urbana-Champaign. He is resident licensed in the state of Ohio for life, accident and health insurance.

Natalie Schwatka, Ph.D.
Colorado School of Public Health
Researcher at Center for Health, Work & Environment; Instructor for the Department of Environmental & Occupational Health
Dr. Natalie Schwatka is a researcher with the Center for Health, Work and Environment at the Colorado School of Public Health, University of Colorado Denver. She is responsible for the development and execution of research and community-based projects with the aim of advancing worker health, safety and well-being. She is also instructor within the Department of Environmental and Occupational Health where she teaches an occupational safety and ergonomics course for master’s students and occupational medicine residents. She has published seven scientific publications and has given over thirty national and international presentations. Her current research topics include safety and health leadership, Total Worker Health®, workers’ compensation, and health and productivity at work. She received her bachelor’s degree in psychology from the University of Portland and her master’s degree and Ph.D. in environmental health from Colorado State University with a concentration in occupational ergonomics and safety.
Dr. Steven Serra, M.D.
Aetna
Senior Medical Director

Dr. Steven Serra is a senior medical director within National Accounts’ CCSA where he has responsibility for Aetna’s Hospital Vertical & AetnaOne Premier clients nationally. In this role, Steven provides clinical, strategic, consultative and analytic support to NA account management and sales teams and their clients. Steven also currently serves as the President for the Coventry Workers’ Compensation Medical Exams business in New York. Dr. Serra joined Aetna in 2007 with the acquisition of Schaller Anderson Healthcare (now the Aetna Medicaid Business Unit) where he served as their medical director for workers’ compensation. Prior to joining Schaller Anderson Steven served as the regional flight surgeon for United Airlines and as the plant medical director for DaimlerChrysler where he practiced occupational, aerospace and administrative 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 and as a certified medical review officer. Dr. Serra trained at the University of Utah where he completed his Occupational Medicine Residency and received a MPH in Occupational & Environmental Health & Safety. Steven works and lives in Nashville, Tennessee and is an active fellow of the American College of Occupational & Environmental Medicine. Dr. Serra is a current member of the Integrated Benefits Institute Board of Directors and a past Board Member for the National Business Group on Health’ Institute of Health, Productivity & Human Capital.

David Setzkorn
The Standard
National Practice Leader - Absence Management

David Setzkorn, National Practice Leader Absence Management, leads the strategic development of The Standard’s Absence Management offering. David’s career over the last 20 years has spanned consulting, procurement and sales. His experience includes consultation and development of Absence Management programs with large clients from implementation, training and ongoing compliance with state and federal regulations. In addition, David serves as a liaison among clients, sales/service, administration, legal and compliance. David is a graduate of Arizona State University with a Bachelor’s of Science in Purchasing and Logistics Management and an MBA with an emphasis in Project Management. He also holds a Chartered Property Casualty Underwriter (CPCU) designation along with multiple certifications in IT and Operational Management.

Lorraine Serva
Iron Hill Brewery
HR Director

Lorraine Serva has 27 years of human resources leadership experience in hospitality, high tech, and construction. She currently leads Human Resources for Iron Hill Brewery and Restaurants, a regional company with 12 locations and 1,200 employees. Lorraine’s extensive experience includes designing & implementing talent development and engagement programs, coaching managers, leading change initiatives, talent acquisition and on-boarding, implementing human resources information systems, developing and facilitating management and employee training, best-practice safety programs, employee relations, and most other aspects of human resource management. Lorraine has taught management undergraduate courses at Baylor University and the University of Delaware. She has co-authored peer-reviewed papers including: ‘So, Tell Me About Yourself’: Improving Recruiting Practices within the Information Systems Discipline published in Journal of Information Systems Education; and Discriminatory Practices in the Pre-Employment Process: The Legal Implications published in The Proceedings of the Academy of Legal Studies in Business. Lorraine is SPHR and SHRM-SCP certified and holds a Master in Business Administration with a concentration in Personnel and Industrial Relations. Lorraine is a licensed facilitator of the Coaching Clinic and is certified in the Lominger Leadership Architect, Mediation, and the Myers Briggs Type Indicator. Lorraine is fluent in Spanish.

Vicki Shabo
National Partnership for Women & Families
Vice President

Vicki Shabo is vice president at the National Partnership for Women & Families, a national nonprofit, nonpartisan organization based in Washington, D.C. Shabo she directs the organization’s fair and family friendly workplace policy initiatives. She leads the organization’s work on paid sick days, paid family and medical leave, equal pay and pregnancy discrimination, and serves as a trusted resource for policymakers, business leaders, advocates, researchers and the media. Her perspective and analyses have been featured on CBS Sunday Morning, NPR and MSNBC, and in the New York Times, Washington Post, Associated Press and numerous other outlets. Under Shabo’s leadership, the National Partnership has been integrally involved in landmark victories for women and families, including federal executive action on paid sick days, equal pay and sex discrimination, numerous state and local paid leave, equal pay and pregnancy nondiscrimination laws, and many
private sector policy changes. These advances build on the organization's long history of fighting for and winning public policies and cultural changes that promote workplace fairness and families' economic security. Prior to joining the National Partnership, Shabo practiced law, worked as a pollster and political strategist, and served as a staffer in the U.S. House of Representatives. She is a graduate of Pomona College in Claremont, Calif., holds an M.A. in political science from the University of Michigan, and earned her law degree with high honors from the University of North Carolina.

**Dr. Bruce Sherman, M.D.**  
*Medical Director of Population Health Management*

Bruce Sherman, M.D., FCCP, FACOEM, is the Medical Director, Population Health Management for the RightOpt private exchange offering at Conduent HR Services (formerly Xerox). In this role, he provides strategic client support for development, implementation and ongoing management of integrated, value-based health and performance management strategies for exchange clients. Additionally, Dr. Sherman is the consulting Medical Director for the Ohio-based Employers Health Coalition, Inc. Previously he was the consulting corporate medical director for Wal-Mart Stores, Inc., Whirlpool Corporation, and The Goodyear Tire & Rubber Company. Dr. Sherman has particular interests in the areas of healthcare consumerism engagement, quality and efficiency in health care delivery, and the business value of workforce health. Dr. Sherman has committee leadership roles with the National Committee for Quality Assurance, Health Enhancement Research Organization, and the Population Health Alliance, and is a former member of the leadership board for the Integrated Benefits Institute. A frequent speaker on a national level, he has presented on a broad array of workforce health and benefits design-related topics to diverse audiences, and has published numerous related articles. Dr. Sherman received his M.D. 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. Dr. Sherman continues as a member of the clinical faculty in the Department of Medicine at the Case Western Reserve University School of Medicine.

**Dr. Dexter Shurney, M.D.**  
*Chief Medical Director—Executive Director of Global Health Benefits & Wellness*

Dr. Dexter Shurney, M.D., MBA, MPH is the Chief Medical Director / Executive Director for Global Health Benefits and Corporate Wellness for Cummins, Inc. He has an extensive background in health care management and policy. He has distinguished himself as a recognized leader in his profession in numerous ways. Prior to his current position, Dr. Shurney was the Chief Medical Director of the Employee Health Plan for Vanderbilt University and Medical Center. During his tenure at Vanderbilt he also held joint faculty appointments as Assistant Clinical Professor, Division of Internal Medicine and Public Health, and Adjunct Faculty, Owens Graduate School of Management. Other positions that Dr. Shurney has held include Senior Vice President and Chief Medical Officer for Healthways, Senior Health Policy Strategist in the Division of Government Affairs for the biotechnology company Amgen Inc., Chief Medical Officer and Vice President of medical affairs for Blue Cross Blue Shield of Michigan, and Editor of the Journal of Managed Care Physicians.

Dr. Shurney serves on numerous boards including: The American College of Lifestyle Medicine (ACLM) where he is President-elect, the Global Business Group on Health, the Integrated Benefits Institute (IBI), and the National Association of Managed Care Physicians. From 2007-2009, he served as the Chair of the Tennessee Diabetes Prevention and Health Improvement Board, appointed by Governor Phil Bredesen. He was also the most recent Chair of the Business Strategies Committee for Centers for Disease Control and Prevention (CDC)/National Diabetes Education Program (NDEP). For 12 years he served as the American College of Medical Quality’s (ACMQ) elected delegate to the American Medical Association (AMA). Dr. Shurney is co-author of the book “Integrating Wellness into Your Disease Management Programs” which is a “how to” strategic guide for employers that wish to innovate their approach to chronic condition management. Dr. Shurney is board-certified in general preventive medicine and public health. He is a fellow in the American College of Lifestyle Medicine.

**Dan Sokoloff**  
*Director of Advanced Healthcare Data Analytics*

Dan Sokoloff is Director of Advanced Healthcare Data Analytics at Teladoc, the nation’s first and largest telehealth platform, delivering on-demand health care anytime, from almost anywhere via mobile devices, the Internet, secure video and phone. Dan is responsible for quality measurement across Teladoc’s products and works to assess and improve upon value for Teladoc’s clients and patients—however that value can be measured. Dan is a Yale-trained statistician who loves playing with data. Prior to working in healthcare, he also taught high school and loves talking about data. He lives in New York City with his wife, daughter and their dog.
**Mark Thierer**  
**OptumRx**  
**Chief Executive Officer**

Mark Thierer currently serves as chief executive officer (CEO) for OptumRx. In this capacity, his primary responsibilities include overseeing all Optum pharmacy care services, including the management of pharmacy benefits, pharmacy network, home delivery pharmacy and specialty pharmacy programs. Prior to his current position, he served as chairman of the board and CEO of Catamaran, one of the nation’s largest pharmacy benefit management companies serving 35 million lives, which combined with OptumRx in 2015. Mark’s professional experience includes a 30-year health care industry career leading organizations to financial and operational success. He joined Catamaran, then called SXC in 2006 as president and chief operating officer; then named president and CEO in 2008. Prior to this, Mark led Physicians Interactive, a division of Allscripts Healthcare Solutions, Inc., as president. He spent 10 years with CaremarkRx (now CVS Caremark) as a corporate officer and senior vice president, Industry Relations. Before joining Caremark, he spent 10 years at IBM in various sales management positions in its health industry division. Mark holds a Bachelor of Science degree in finance from the University of Minnesota, a Master in Business Administration from Nova Southeastern University and has earned the Certified Employee Benefits Specialist (CEBS) designation. He is a frequent guest lecturer at Northwestern Kellogg School of Management and The Wharton School of the University of Pennsylvania. Mark serves on the board of directors for the Lyric Opera of Chicago.

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**Scott Thompson**  
**Benfield, a division of Gallagher Benefit Services, Inc.**  
**Area President**

Scott Thompson is an Area President in Chicago for Benfield/AJG. Since 2000, Scott has worked with Biopharmaceutical companies and other healthcare stakeholders to more effectively recognize and capitalize on employer customer partnerships and business opportunities. He helps clients implement and interpret employer-focused customer, market and consumer research, develops strategic and tactical plans, communication tools and provides guidance and support to improve the performance of account management teams. He also works with clients pursuing collaborative partnerships with employers and coalitions focused on yielding measurable improvements in health and health care value. Before joining Benfield, Scott gained 20 years of experience inside the pharmaceutical industry, where he participated in the launch of 15 pharmaceutical products for conditions ranging from heart disease and cancer to...
obesity and arthritis. Scott led and managed account teams, trained sales and account management professionals, built successful disease management, health economics, managed care and retail business units from the ground up, and established a track record of success in the managed markets segments. Scott has earned his reputation as a forward-looking, practical strategist by leading efforts to capitalize on emerging customer markets. For example, he played an instrumental role in publishing breakthrough studies that demonstrated the impact of obesity on worker productivity in the employer environment. He also helped build strategic alliances needed among employers and managed care plans for the development of cost-effective screening, intervention and behavior change programs.

Dr. Kristin Tugman, Ph.D.  
Prudential  
Vice President of Health & Productivity Analytics & Consulting Practice

Dr. 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 to help them minimize absence and maximize productivity. She is a Certified Rehabilitation Counselor and a Licensed Professional Counselor. She 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. Dr. Tugman continues to actively research and develop techniques to assist individuals with psychiatric and other disabilities in maintaining appropriate function in the competitive work force. She graduated from Georgia State University with a Master’s Degree in Rehabilitation Counseling and earned a Ph.D. in Industrial and Organizational Psychology from Capella University.

Nazneen Vimadalal  
Cigna  
Vice President of Product Management

Nazneen Vimadalal rejoins Cigna as the Head of Specialty Product department responsible for Life, Disability, FML products for both Group Insurance and Individual. Nazneen has extensive leadership experience with deep industry knowledge and experience in the employee benefits arena. Most recently, Nazneen worked at MetLife and led the Marketing and Enrollment organization, creating strategies and solutions to transform internal capabilities and establish an enrollment center of excellence focusing on employee engagement for Met’s clients. Prior to that Nazneen led the Product & Marketing team at Liberty Mutual. She was responsible in the creation of a product organization to set the strategic direction and execute on solutions to increase market share and drive profitable growth. She led the launch of the industry’s first disability mobile app to track leave. She also worked at The Hartford in various capacities including product and strategy and created the international solution for The Hartford’s employee benefits division. As mentioned above, Nazneen is not new to Cigna. She worked at Cigna for over 10 years when she began her career as a benefits analyst. Nazneen is the author of several published articles and has been invited to present at several industry conferences. She has been a board member of DMEC, LIMRA & VEBB. She is the recipient of several awards from both Disability Management Employer Coalition (DMEC) and Life Insurance and Market Research Association (LIMRA) for her contributions to the employee benefits industry. She lives in Boston with her husband and two daughters.

Michael Vittoria  
Lifespan  
Director of Benefits and HR Solution Center

Mike Vittoria is Director of Benefits and the HR Solution Center at Lifespan in Providence, Rhode Island where he leads a team of employee benefits and human resources shared service specialists serving 14,000 employees at the five hospitals and other provider groups that comprise one of Southern New England’s largest integrated health care delivery systems. Prior to Lifespan, he served in senior HR leadership positions with the MaineHealth health care system and Sperian Protection, a global manufacturer of workplace safety products. Mike has been a frequent presenter and panelist on health plan design, worksite wellness and the impact of employee health and disability on workplace productivity at professional conferences and seminars across the United States. His organizations’ plan designs have been featured by WorldatWork, Benefits & Compensation Digest, Business Insurance Magazine, Employee Benefits News, and The Wall Street Journal. Mike received a BS in Business Administration from Marquette University, an MBA from Providence College and a JD from Suffolk University Law School. He is the past president of the Rhode Island Business Group on Health and is the current president of the Greater Boston Chapter of the Disability Management Employer Coalition (DMEC).
**Lyne Wilson**  
**NAV CANADA**  
**Director, Talent Acquisition & Organizational Health**  
Lyne Wilson is the Director, Talent Acquisition and Organizational Health for NAV CANADA, the owner and operator of the country’s civil Air Navigation Service. She is responsible for HR based activity within the organization from both an operational and strategic perspective. Since 2000, Lyne has held a number of positions at NAV CANADA. She is currently responsible for Talent Acquisition, Employee Health and Wellness Programs and Employee Relations complaints. Lyne is also the Program Director of their mental health peer support program, Light the Way. She has championed mental health in the workplace by developing a mental health strategy in 2009 and implementing the peer support program in October 2012.

**Andrew Yohe**  
**UMPC WorkPartners**  
**Vice President**  
Andy oversees the Operational, Analytical, Financial and Technology functions for UPMC WorkPartners. Andy has been with UPMC WorkPartners for 20 years and has played an integral role in the architecture and innovation of UPMC’s integrated health and productivity platform. The integrated platform utilizes data and analytical models across many key benefit areas including absence management, workers’ compensation, population health management and employee assistance programs. Andy and his team continue to leverage these data models to detect trends in physical health, mental health, claims management and the overall picture of employee health. As a result, UPMC WorkPartners has been able to drive better health outcomes for employees, reduced time away from work and has yielded significant overall health and productivity savings that directly impacts the bottom line. Andy holds a Bachelor of Science degree from Indiana University of Pennsylvania and an MBA from the University of Pittsburgh.

**Katie Zaidel**  
**ReedGroup, LLC**  
**Data Scientist**  
Katie Zaidel is ReedGroup’s Data Research Scientist for the MDGuidelines Team. Katie joined ReedGroup in 2016, bringing more than 8 years of consulting in occupational and environmental health research and litigation support for public and private sector clients. Her experience includes data management and analysis, statistical modeling, systematic literature review, and risk assessment. She now focuses on obtaining reliable trends in disability absence data, costs related to health care, and other information applicable to returning individuals to their active lifestyle. Katie holds a Master’s degree in Environmental Management from Yale University, as well as a Bachelor of Arts degree in Biology from Colorado College.

**David Zimmerman**  
**Tazewell County**  
**County Board Chairman**  
David Zimmerman has served for the past 20 years on the Tazewell County board, the last 8 as Chairman. Tazewell County is Illinois’ 15th largest county by population with over 137,000 residents. In his role as board chairman he oversees a 60 million dollar budget with a county of more than 600 employees. Tazewell County also has the lowest tax rate in the State of Illinois, no debt and healthy fund reserves as it deals with the current budget crisis within the state. He chairs the UMED Insurance board and also serves as the Treasurer to the ICRMT board. Additionally, Zimmerman is active in several statewide and regional organizations including leadership roles in the Illinois Counties Association, Metro Counties, United Counties Council of Illinois and the Workforce Investment Policy board. Within Tazewell County he chairs the Insurance Review committee. This committee was created to take all healthcare issues out of the bargaining units and through a collaborative approach, find solutions to the difficult issues surrounding healthcare costs. He has also spent the last 30 years working in the pharmaceutical industry. In his free time he enjoys spending time with his family and reading. Zimmerman was recently reelected to another four year term where he looks forward to working closely with all the elected officials in making Tazewell County a model of what efficient and cost effective government should look like.
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Presented by Cigna Group Insurance®:
Opening the Door to Workplace Mental Health
Monday, March 27, 2017 | 1:00 – 1:20 p.m. | Grand Ballroom

Featured at the session:
An Executive Summary of the 2016 DMEC Workplace Behavioral Health Survey

Speakers:
Terri L Rhodes, CEO, DMEC
J. Michael Vittoria, Director of Benefits, Lifespan
Karen English, Partner, Spring Consulting Group
Nazneen Vimadalal, Vice President of Product Management, Cigna

* 2016 DMEC Workplace Behavioral Health Survey

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1 Client satisfaction survey, Gestalt, Inc. 2015. | © 2016 Securian Financial Group, Inc. All rights reserved. Insurance products are issued by Minnesota Life Insurance Company or Securian Life Insurance Company, a New York authorized insurer. Both companies are headquartered in St. Paul, MN. Product availability and features may vary by state. Each insurer is solely responsible for the financial obligations under the policies or contracts it issues. 106073 DOI14-2-2017.
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For 20 years the Integrated Benefits Institute (IBI) has provided data, research and resources to help professionals promote and enhance workforce health.

UnitedHealthcare shares a similar commitment to offering access to innovative, quality health care products and services to help our members live healthier lives.

We are proud to support the 2016 IBI Annual Forum and all those in attendance who work to promote a healthy, productive workforce.

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Hotel Map

32nd Floor
Tower Building

Second Floor

Mezzanine

POWELL STREET LOBBY

Georgian Room

Borgia Room

Colonial Room

Italian Room

Grand Ballroom

Mezzanine Level Registration

Registration

Mezzanine

Victor’s

LOUNGE

FOYER

VESTIBULE

FOYER

TOWER ELEVATOR

MAIN ELEVATOR

TOWER ELEVATOR

California Room

Elizabethan Room

West

East

Hotel Map 2017 IBI Annual Forum 55