



**CPBI Southern Alberta
 Professional Development Day
 Benefits in Changing Times**

Wednesday, October 7, 2015 7:30am – 4:00pm
 Fairmont Palliser Hotel, 133 – 9th Avenue SW

7:30 - 8:00 am Registration & Breakfast

8:00 - 9:15 am Session 1

Topic **Mergers, Acquisitions and Divestitures – a Benefits Case Study**

Speaker **Melanie Jeannotte – Area President, Vital Benefits, a division of Gallagher Benefits Services (Canada) Group**
Joanne Robertson – Director, Human Resources, Nabors Drilling Canada Limited

Description With oil prices at five year lows, it is anticipated there will be a flurry of M&A activity in 2015 as some organizations struggle to weather the oil slump while others look for opportunities to be well positioned for a price rebound. If your organization is expected to be part of a merger or acquisition - this session is for you! In this session you will learn:

- Why you need to be at the merger table as early as possible
- How benefits philosophy and benchmarking can help guide decisions
- Key stakeholders you need to consider in your communications strategy

Biography Melanie Jeannotte has devoted her career to helping corporations and professionals meet their business and benefit needs. As the Area President for Gallagher Vital Benefits she brings extensive experience from several National Insurers and large consulting firms and leads a strong team of benefits & pension consultants.

Melanie works with a diverse client base, partnering with human resource teams in both mid-sized and large organizations across Canada and the United States, to help create tailored Benefit and Pension programs.

She is a regular speaker and author on benefit trends and business practices, sharing her industry experience and commitment to managing healthcare risks. Melanie is active in the Calgary business and philanthropic community, and was named one of Calgary's Top 40 Under 40 in 2012. She was also recently recognized on the cover of Advantage Magazine as one of Canada's leading Female Entrepreneur's and has been recently nominated as one of Canada's 100 Most Powerful Women for 2015.

Joanne Robertson is a business executive with 25 years' experience in the field of human resource management with expertise in benefits, organizational development, employee relations and change leadership. She has held senior

management positions in some of the world's largest multi-national companies in a variety of industries. Currently Joanne is the Director of HR for Nabors Drilling, the world's largest land-based drilling contractor. She is a regular guest speaker at Bow Valley College and has volunteered with the Human Resources Institute of Alberta and is currently mentoring several up and coming HR Professionals. Joanne is based in Calgary, Alberta and is a Certified Human Resources Professional, a Myers Briggs Qualified Facilitator as well as a Certified Executive Coach from Royal Roads University.

9:15 – 9:30 am Break

9:30 – 10:30 am Session 2

Topic A new way to look at Mental Health in the workplace:
Illness or Injury? – Clinical or Leadership issue?

Speaker ***Lt. Col Stephane Grenier – Principal Founder, Mental Health Innovations***

Description In today's modern workplace, mental health problems have become the leading cause of disability claims, accounting for 70% of workplace disability management costs in Canada. Lieutenant-Colonel (Retired) Stéphane Grenier knows the toll mental health problems can take on individuals and workplaces firsthand. Traditionally, mental health difficulties in the workplaces have been principally viewed through two lenses. The performance lens and the clinical one. Clinicians treat symptoms and leaders manage behaviours.

Anchored in over 15 years of experience in improving the way large public and private sector organizations support their employees, Grenier offers his audiences pragmatic advice designed to support workplaces in developing corporate cultures of open, non-stigmatizing approaches to mental health and wellbeing.

Blending lived accounts, riveting corporate case studies, leading-edge research and passionate arguments that the status quo is no longer acceptable in the field of workplace mental health, Grenier makes us ask ourselves, how did we miss the obvious? How did we miss our people?

Biography Stephane Grenier is a Veteran of the Canadian Military who retired as a Lieutenant Colonel following 29 years of service and numerous overseas missions such as in Cambodia, Haiti, Lebanon, and Kuwait. Most notably, he spent 10 months in Rwanda in 1994/95 and six months in Kandahar, Afghanistan in 2007.

Faced with undiagnosed post-traumatic stress disorder (PTSD) and depression upon return from Rwanda, he took a personal interest in the way his workplace, was dealing with mental health issues. In 2001 he coined the term Operational Stress Injury (OSI) and conceived, developed, implemented and managed a government based national peer-support program that successfully operates to this day. In 2007 he was appointed as the Operational Stress Injury Special Advisor to the Chief of Military Personnel and entrusted with the task of creating a Canadian Forces-wide workplace mental health education program. His work led to the launch of a second highly successful non clinical mental health program that now delivers "peer based" mental health education to over 20,000 military personnel per year and that has now been expanded since his departure.

In 2008 was asked to become a member of the Workforce Advisory Committee of the Mental Health Commission of Canada (MHCC) and two years later he joined the Mental Health Commission of Canada on assignment from the Canadian Military to spear-head the development of Guidelines of Practice for Peer Support in Canada, amongst other things.

In 2012, he retired from the military and created Mental Health Innovations consulting (MHI) in order to dedicate his full attention to developing non clinical mental health interventions as a complement to traditional clinical care and also co-founded Peer Support Accreditation and Certification (Canada), a non-profit organisation dedicated to the advancement of peer support.

Throughout his career, Grenier has been recognized for his transformational leadership style, commended for his collaborative efforts and outstanding leadership, specifically during the post war humanitarian disasters in Rwanda, and was awarded a Meritorious Service Cross by the Governor General of Canada for his work in the field of mental health and awarded an honorary degree of Doctor of Laws by the University of Guelph.

10:30 – 11:45 am Session 3

Topic **Measuring Impact – Comprehensive Wellness at Canadian Natural Resources**

Speaker ***Michael Kennedy, National Lead for Health Strategies and Wellness, AON Hewitt Trent Dixon, Canadian Natural Resources***

Description Canadian Natural Resources offers its employees wellness programs – hear about how the program was established, and what results are being seen. You will hear how support was built with leaders around the organization, how strong participation was achieved, and how innovative evaluation tools track the impact of wellness program participation on benefit claims and costs.

Biography Mike Kennedy has been working with organizations for almost 20 years to design, develop and deliver effective workplace health programs.

Mike graduated with an Honours degree specializing in Health Promotion. His experience includes supervising a North America-wide wellness program for a manufacturing company. He was co-founder of a firm providing disability management, occupational health, wellness and occupational medicine services, and has also worked for a leading EAP firm as a subject matter expert in health management.

Currently a Vice President in Aon Canada's Health and Benefits practice, Mike is the National Lead for Health Strategies and Solutions. He and his team work with clients across Canada using analytics to identify priorities, to design efficient and effective health programs, and to launch and manage the delivery of programs to produce demonstrable outcomes.

Trent Dixon is a just a simple HR guy with over twenty years of experience doing simple HR things. He is currently the Manager of Assorted HR Stuff (including benefits) at Canadian Natural Resources Limited.

As part of his role, Trent is responsible for Canadian Natural's Wellness Program called Strive. Strive was launched in 2012 and has quickly become embedded in the Canadian Natural culture.

When he's not doing HR stuff you can usually find Trent on a bicycle or a golf course and is hoping one day to combine the two activities.

11:45 - 12:30 pm Lunch

12:30 - 1:30 pm Session 4

Topic **Legal Update**
Speaker **Michael Wolpert – Partner, Lawson Lundell LLP**

Description For those in the pensions and benefits industry, the focus on legal developments is often on pensions. However, group benefits have their own legal considerations that should not be ignored. This session will provide an update on significant benefit cases and legislative changes that you should know about, and their impact on plan sponsors, administrators and members.

Biography Michael Wolpert practices exclusively in the areas of Pensions and Employee Benefits. He provides clients with insight and practical counsel about legal and regulatory issues, both provincial and federal, surrounding retirement plans, employment benefits and other related human resource issues. In business transactions Michael advises clients on the pension and benefit implications. In addition to providing support on pension and benefit litigation, he assists clients with service provider agreements and the drafting of plan and trust documents. Michael is also highly experienced in the legal aspects of governing, administering and documenting group benefit plans, including non-pension post-retirement benefit plans.

Michael is Chair of the National Pensions and Benefits Law Section of the Canadian Bar Association, and a Past Chair of the Canadian Pension and Benefits Institute's National Board of Directors. He is also a frequent presenter and writer on pension and benefit topics. Michael has been consistently recognized in Best Lawyers in Canada, and is recommended as a Leading Practitioner for pension and employee benefits (management) in Canadian Legal Lexpert Directory

1:30 - 2:30 pm Session 5

Topic **Drug Plan Management in an Era of Catapulting Growth**
Speakers **Barbara Martinez – Practice Leader, Benefits Solutions, The Great-West Life Assurance Company**

Description 2015 drug spending is poised to have the highest growth seen in more than 10 years in Canada. And this is just the beginning of the upward trajectory. We are entering an era of catapulting growth and now is the time to understand the issues, challenges and opportunities. For this presentation we encourage you to BRING YOUR CELL PHONE. We will poll the audience using text messaging to engage participants and share the collective response. Learn what is changing in the drug landscape to drive drug spending to new heights, why this is happening now and what plan sponsors can do to sustain drug plans in the new era.

Biography Barbara A. Martinez is the National Practice Leader, Drug Benefits Solutions in the Toronto Group Sales office of Great-West Life Assurance Company. Barbara provides support to Great-West Life Group Sales Offices across Canada on our prescription

drug management initiatives. She plays a key role in supporting plan advisors and their clients on Great-West Life drug solutions products.

Barbara joined Great-West Life in November of 2012 and is ideally suited to this role. She comes to Great-West Life with 10 years' experience at Mercer, where she lead the Canadian drug benefits consulting team. She is also well known as a regular speaker at industry forums and commentator on employer drug programs.

Barbara has in-depth knowledge of the prescription drug, regulatory and drug approval process in Canada from both a government and private drug plan perspective. Her past experience includes 13 years of working in the pharmaceutical industry. Her main responsibilities were sales & marketing as well as government and professional affairs.

2:30 - 2:45 pm Break

2:45 - 3:45 pm Session 6

Topic **Benefits Fraud – an “Intelligent” Response**

Speaker ***Randy Fahr – Director, Investigative Intelligence Unit (IIU), Sun Life Financial***

Description With mounting cost pressures within Group Benefits plans, fraud in group benefits has never been as urgent an issue as it is today. Industry studies estimate that fraud could account for up to \$6 billion in losses annually within employer-sponsored group benefit plans, which equate to higher costs and premiums for plan sponsors and members. In this session we will discuss the increasingly complex and rapidly changing world of fraud management, using real life examples from both the member and provider side of the fraud equation. We will also discuss how "big data" and technology advancements are becoming increasingly important tools in helping not only to identify potentially fraudulent claims, but also in identifying and understanding new trends and schemes that will need to be addressed in the future. Finally, we will discuss the important role that you as Plan Sponsors can play in helping to ensure your group plan is protected against fraud and abuse.

Biography Randy Fahr leads a team focused on intelligence information management, data analysis and the identification of risks and fraudulent trends. Using sophisticated tools such as social network analysis, predictive analytics, anomaly detection applications, and information collected from a wide variety of sources, this unit helps drive the development and ongoing execution of fraud detection and prevention programs at Sun Life Financial.

Randy has 25 years of operations leadership experience having formally been the Director of Sun Life's Investigative Services Unit and the Director of group health and dental claims processing operations at Sun Life and other major Canadian group insurers.

3:45 pm Close & Networking