



CPBI Saskatchewan Presents

Benefits, Beyond the Basics

OCT 24, 2023 - 1 DAY SEMINAR

Hotel Saskatchewan, Regina, SK



Join us for a full program addressing in-depth aspects of group benefits plans, current trends and emerging issues. This 1-day seminar will provide a comprehensive framework that will enhance your understanding of benefits, act as a primer for the CEBS program, and offer valuable continuing education credits for the Insurance Council of Saskatchewan. This is also an excellent opportunity to network with fellow participants and event speakers. Attendees will also receive a certificate of completion.

AGENDA

8:00 am Registration & Breakfast

8:40 am Opening Remarks

8:45 am Session 1

9:45 am Break

10:00 am Session 2

11:00 am Break

11:15 am Session 3

12:15 pm Lunch

1:00 pm Session 4

2:00 pm Break

2:15 pm Session 5

3:15 pm Break

3:30 pm Session 6

4:30 pm Closing Remarks

BENEFITS, BEYOND THE BASICS

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AGENDA

8:00 a.m. **Registration & Breakfast**

8:40 a.m. **Opening Remarks**

8:45 a.m. **Session 1: Roles and Responsibilities**

This session examines the roles and responsibilities of insurance carriers, employers, and employees. You will be provided with information on what your rights and expectations are as the policyholder, administrator, employee. The focus will be on what's in (or not included in) the insurance contract and why those provisions are there. This presentation will set the stage for the rest of the seminar.

Speaker: Alana Shearer-Kleefeld

9:45 a.m. **Break**

10:00 a.m. **Session 2: Claims Administration**

This session provides an overview of claims administration for short/long term disability, and health and dental. What happens when a plan member makes a claim? What technological advances have been made? How can claim administration be made more efficient? The session will also outline the plan member's experience, the plan sponsor's expectations, who is paid and when, and how carriers protect the future of the plan and control costs.

Speakers: Jen Robertson (Disability) + Lyn McGaughey (Health and Dental)

11:00 a.m. **Break**

11:15 a.m. **Session 3: Total Compensation/Total Rewards**

What are total rewards and why they are important to organizations? This presentation will answer these questions, explore the types of total rewards models, and discuss how to implement a program that aligns with market conditions.

Speaker: Shannan Corey

12:15 p.m. **Lunch**

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AGENDA Continued

1:00 p.m. Session 4: Funding

How are premiums set? What is the role of a group's experience rating? How is a plan's cash flow monitored? How is the insurance company selected? What criteria should be employed? When should the plan sponsor self-insure? This session examines these and other issues relating to the financial management of benefits plans.

Speakers: Randy Lewis

2:00 p.m. Break

2:15 p.m. Session 5: Emerging Issues

Absenteeism, presenteeism, mobile technology, wellness programs, millennials, managed drug formularies... the buzz words surround us. But what does that mean for the world of benefits? Are we headed for a benefit meltdown or what will the next 5 years bring? This provocative session will kick start your thinking as we look into the future.

Speaker: Grant Boissonneault

3:15 p.m. Break

3:30 p.m. Session 6: Flex Benefits: The Past, Present & Future

This session will focus on the fundamentals of flexible benefits including details on considerations in the design, administration, and pricing of flexible arrangements. The session will include a discussion on an array of design options in adding flexibility to a plan, including flexible spending accounts, modular plans and cafeteria style plans.

Speaker: Melissa Loos

4:30 p.m. Closing Remarks

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SPEAKER BIOGRAPHIES



Alana Shearer-Kleefeld
Director, Employee Benefits
3sHealth

With over 30 years of experience in benefits and an intense focus on improving the benefits plan member experience, Alana Shearer-Kleefeld joined the 3sHealth Senior Leadership Team in 2022 as Vice-president, Employee Benefits. Alana leads a team of 3sHealth employees dedicated to providing world-class customer service to plan members by “taking care of the caregiver.”

Alana’s experience includes various benefits leadership positions at 3sHealth and at private sector insurance companies. At 3sHealth, Alana has focused on improving the plan member experience, redesigning the approach to disability claims management, and cultivating strong partnerships and governance practices. Alana holds many credentials including certifications as a Saskatchewan Lean Leader and in Advanced Trust Management Standards (ATMSTM). She also volunteers her talents to her sector, most recently having served 11 years on the Canadian Pension and Benefits Institute – Saskatchewan Regional Counsel.

Alana enjoys cooking and baking, gardening, and cheering for her favourite team in green and white.



Jen Robertson
Assistant Vice President (AVP), Disability Claims
Co-operators

Jen leads a dynamic team of Group Disability claims management professionals. Jen & her team recognize that every person and claim is unique, and they deliver personalized disability solutions that deliver long-term financial sustainability and positive member outcomes. She is acutely focused on elevating the member experience and bringing value to the client with every interaction. Jen is a strategic thinker, driving innovation and continuous improvement throughout the disability management process while remaining true to co-operative values. Automating fragmented industry practices and digitizing the claims process to provide plan sponsors and members value through self-serve digital platforms.

She has over 15 years of experience with the Co-operators in various leadership roles including Group Benefits, Individual Life, and Creditor and over 25 years of experience in the insurance industry. Outside of work she enjoys summers at the lake and a great TV series during the long Saskatchewan winter. Ted Lasso and Stranger Things are her top two (2) recommends!



Lyn McGaughey
Employee Benefits Specialist
Co-operators

Lyn McGaughey is a Certified Employee Benefit Specialist and independent group benefits broker. A diversified professional with over 20 years of experience in the financial services and group benefits industries, Lyn was responsible for the creation of the Wealth Management Department of Kamsack Credit Union and led the regional Saskatoon group benefits team for one of the major Canadian insurance carriers. Lyn is passionate about community involvement, and

helping businesses succeed. She loves the non-stagnant nature of the benefit industry and thrives on change. Lyn finds there is always something changing with her clients’ businesses, their employees or healthcare in general. Believing strongly in community involvement, Lyn’s current roles with CPBI are Regional Council Member, Chair of Sponsorship and Membership, and Conference Planning Member. Lyn’s past roles include Program Chair for the Advocis North Central Saskatchewan Chapter Treasurer and Co-Chair of the 2019 National Strategies for Success Conference. Lyn sat on the board of Discover Saskatoon (formerly Tourism Saskatoon) from 2011 to 2016. Board responsibilities over her 5-year tenure included the Audit Committee, 2nd Vice Chair, Chair and Past-Chair.

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SPEAKER BIOGRAPHIES



Shannan Corey
Executive Director
Saskatchewan Pension Plan

Shannan Corey is an authentic, effective and seasoned professional with a diverse background; from a math degree at U of S, to an Associate Actuary designation, and ultimately rounding out her experience by becoming a CPHR. Shannan brings 30 years of industry experience, including over 28 years in consulting and 5 years as a Director of Total Rewards for a large company in the private sector.

Most recently, Shannan's role as Executive Director of the Saskatchewan Pension Plan since June of 2021 allows her to pursue her passion of enhancing retirement security and member experiences for a large, diverse membership base. Shannan's prior experience serving on the Board of the Co-operative Superannuation Society Pension Plan, as well as currently serving as an independent Board Director on the Saskatchewan Teachers' Federation Pension & Benefits Board, allows her to bring innovation and best practices to improved member experiences and operational effectiveness while connecting to her community values. Shannan is pleased to be able to support the noble and worthy cause of being able to offer a professionally managed pension plan and quality, trusted member services to everyone who chooses the Saskatchewan Pension Plan.



Randy W. Lewis
President
Lewis Consulting

Randy is President of Lewis Consulting. A graduate of the University of Alberta, he has served in the Insurance industry for over 40 years, 21 of those years with major Insurers before forming Lewis Consulting in 2004. Randy has successfully built relationships with Clients that share a desire to be innovative. His clients understand that the key to benefit leadership lies with intelligent plan design, comprehensive claiming metrics, employee empowerment and wellness. Randy helps both large and small employers; he has consulted to Health Canada, the Saskatchewan Drug Plan, the Medical Associations of Saskatchewan, Alberta and BC, Crown Corporations and to the largest Credit Unions in Saskatchewan. Randy has been a Board

Member for both CPBI National and CPBI Saskatchewan, assisted in conducting Benefit Basics Courses and has spoken at CPBI Saskatchewan Spring Conference. He is an active cyclist, motorcyclist, skier and photographer. Married to Amanda for 40 years, they have a daughter and a 9 month old grandson.



Grant Boissonneault, GBA, BA (hons.)
Assistant Vice President, Client Relationship
Aon

Grant is an assistant vice president, Client Relationship, within Aon's Western Canadian Health Solutions practice. In this role, he is responsible for client consulting and relationship management and works with plan sponsors to create sustainable benefits programs leveraging a comprehensive benefits strategy.

Prior to joining Aon in 2023, Grant held increasingly senior roles in sales, sales management, strategy, and product development at two national insurance carriers. Grant has over 20 years' experience partnering with plan sponsors to maximize their benefits strategy.

Grant first began working in the industry in 1999.

Grant's expertise includes drug plan management, innovative benefits solutions, disability claim management, and executive compensation strategies.

Grant earned a Bachelor of Arts (honours) from Carleton University in 2000.

He also holds a GBA (Group Benefits Associate) designation.

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SPEAKER BIOGRAPHIES



Melissa Loos
Account Executive
Manulife

BIO