

# Wisconsin SHRM State Conference October 16-18, 2019

Kalahari Resort & Convention Center, Wisconsin Dells, WI

## The Solutions Oriented Leader

Thursday, October 17, 2019 – Dr. Rick Goodman

8:00 a.m. – 9:15 a.m.

Track: Personal and Leadership Development

Level: All Levels

Competency: Leadership and Navigation



It's time to be part of the “*Solution Revolution*” and join the thousands of leaders and companies throughout the world who are becoming solution-oriented leaders. You'll discover how to Transform Your Thinking, Optimize Your Assets and Accelerate Your Connectivity to achieve world-class balance and results in your business and in your life.

Now you can be in control of your destiny - giving yourself permission to be successful! You can become a leader who inspires others for a lifetime. You can harness your positive attitude and share it to propel your business to new heights.

With the “*Solutions Oriented*” mindset, you now have the business and life playbook promoting productivity, boosting employee engagement, and creating a happy work environment.

Learning Objective 1: Attendees will learn how to use transformational leadership tools to communicate their vision and participate as a contributing partner in the organization's strategic planning process.

Learning Objective 2: Attendees will discover specific techniques that will help them develop and utilize key performance indicators to help measure achievement of their organization's strategic goals and objectives.

Learning Objective 3: Leaders will be able to develop and execute business plans that correlate with the organization's strategic initiative.

Dr. Rick Goodman, CSP, is renowned as one of the most sought-after leadership and engagement experts in the world today. His keynote presentations and breakout sessions have produced transformational results leading to engaged employees, increased productivity and, most importantly, HIGHER PROFITS.

Dr. Rick has the distinction of delivering over 1,000 presentations in all 50 states and 16 countries. He earned the Certified Speaking Professional (CSP) designation which is the speaker profession's international measure of speaking experience and skill. Fewer than one percent of all professional speakers worldwide hold this designation.

Dr. Rick is the author of three books: “*Living a Championship Life – A Game Plan for Success*,” “*My Team Sucked: Ten Rules That Turned Them Into Rock Stars A Small Book with Big Solutions*” and “*The Solutions-Oriented Leader: Your Comprehensive Guide to Achieve World-Class Results*.”

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## **Inclusion 2030: Global Workforce Trends that are Redefining the Workplace, the Workers and the Work**

**Friday, October 18, 2019 – Dr. Shirley Davis**

**8:30 a.m. – 9:45 a.m.**

**Track:** Global HR

**Level:** All Levels

**Competency:** Global and Cultural Effectiveness

### **Friday's Keynote Sponsored by Anthem Blue Cross and Blue Shield**



The work, workers, and workplace of the future will continue to undergo dramatic transformation. Research suggests that by 2030 workers will be older and younger at the same time, more educated and less skilled, hyper-connected through new technologies, and more ethnically diverse. How can we ready our organizations for this new workforce reality? What new strategies, competencies, and skills will be necessary to harness the benefits, yet counter the negative effects of these global disruptions? More importantly, what new leadership models will be needed in order to achieve high performance, innovation, and inclusiveness?

Dr. Shirley Davis, SPHR, SHRM-SCP, CSP, is an accomplished corporate executive, global workforce and talent management expert, a certified leadership coach, and master of reinvention. She works with leaders at all levels and has worked in more than 30 countries on 5 continents and delivers more than 80 speeches a year. Dr. Davis has worked at several Fortune 100 companies in senior and executive leadership roles. Her expertise lies in providing solutions and strategies for achieving leadership excellence and in building high performance and inclusive workplaces where all talent can thrive. She is the former Global Head of Diversity, Inclusion and Workplace Strategies for the Society for Human Resource Management (SHRM).

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## Complaint Free Business

**Friday, October 18, 2019 – Will Bowen**

**12:15 p.m. – 1:30 p.m.**

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

## Friday's Keynote Sponsored by Anthem Blue Cross and Blue Shield



HR is a critical function in organizations and is a fantastic profession!! Too often we sell ourselves short versus leveraging the value and strength we bring each day. This session shows practitioners tangible ways to own their role in their company, effective ways to integrate across departments, and how to build and sustain the human factor in the workplace.

Attendees will learn how to develop tangible, strategic value and lead HR in their roles and their organization.

Takeaways include:

- Owning HR - HR is at a crossroads where we need to own who we are and what we bring to organizations. We are not a support function. We are a leadership/development arm of the company.

Will Bowen is the founder of the Complaint Free® movement with over 12 million followers worldwide.

Will's been featured on Oprah, Dr. Oz, Forbes, NBC's Today Show, CBS Sunday Morning, The ABC World News, Fox News, People, Newsweek, The Wall Street Journal, and Chicken Soup for the Soul.

In July 2006, Will Bowen handed out 250 purple rubber bracelets inviting people to use them as a tool to stop complaining. Will's idea EXPLODED around the world and, to date, more than 12 million of his purple Complaint Free bracelets have been distributed to people in 106 countries. Will Bowen is a humorous motivational speaker, a #1 International best-selling author, a multi #1 Amazon best-selling author, an award-winning trainer, the 2016 Purdue University Executive in Residence, and he's the World Authority on Complaining — why people complain, what's wrong complaining, and how to get ourselves and others to stop.

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## Financial Literacy in the Workplace

Patrick Carpenter and Shawn Burcham

Wednesday, October 16, 2019

1:00 – 4:30 pm

**Room:** A and B

**Track:** Business Acumen

**Level:** All Levels

**Competency:** Business Acumen

Patrick Carpenter, President of GRITT Business Coaching will present a highly engaging workshop on holistic ways to engage with your work force. This workshop will be based on the recently released Forbes published book, Keeping Score with GRITT by CEO Shawn Burcham, and include some content from Patrick's upcoming book, Bring the Heat. This session will teach attendees valuable and tangible strategies for using scorecards, financial literacy, intensive education and positive psychology to directly increase employee engagement. Learn from real world examples from Patrick's work with hundreds of companies spanning 30 years in business and coaching. Find out what worked and what didn't work in this high energy workshop.



Patrick's 30-year career includes senior management positions with two global fortune 100 companies and international business assignments in Canada, Brazil, Mexico and the UK where he opened offices and launched new products. During his career he has developed over \$300 million dollars in new business. He has worked with companies such as McKesson, Johnson & Johnson, TYCO, 3M, Novartis, Kiobassa, and New Belgium as well as public institutions such as John Hopkins University, Kansas University and the Mayo Clinic. Patrick is the son of the late Jill Carpenter, who helped to pioneer the concept of Open Book Management, co-authoring two books, The Power of Open-Book Management and The Field Book of Open-Book Management. Patrick's life work is now dedicated to honoring the legacy of Jill and the thousands of employees who are just crazy enough to believe that all employees should be treated with unconditional positive regard and taught to understand the financials, reaping the rewards they helped create.



Shawn Burcham is the Founder & CEO of Pro Food Systems, Inc. (PFSbrands) which he and his wife Julie started out of their home in 1998. PFSbrands has grown to 130+ employee-owners across 18 states and is now 100% employee-owned. The company has over 1,300 branded foodservice locations across 39 states and they are best known for their Champs Chicken franchise brand which was started in 1999. The company now offers BluTaco as a franchise brand and Cooper's Express as a license program. Since starting PFSbrands, Shawn has started and grown over 10 businesses while also investing in other businesses where he feels he can help owners become more successful, including the business coaching company **GRITT Business Coaching**. Shawn also spent 5 years with a Fortune 100 company, Mid-America Dairymen (now Dairy Farmers of America). It's because of these varied experiences that Shawn truly believes empowering employees to think and act like owners is the recipe for success.

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## Inclusion from the CEO Perspective, Panel Discussion

Dr. Shelton Goode as Moderator, Cathy Jacobson CEO Froedtert Health

Wednesday, October 16, 2019

1:00 – 4:30 pm

**Room:** H and G

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Global & Cultural Effectiveness

Front line supervisors and managers are critical to creating a culture and inclusive work environment that enable employees to be their best. However, not all leaders have the skills necessary to accomplish this objective. The objective of this workshop is to provide participants with training on the traits of inclusive leadership and link them to corporate leadership attributes. Dr. Shelton Goode will provide hands on scenarios and opportunities for discussion and modeling. Attendees will be able to participate in discussions with one or more corporate Chief Executive Officers and peers who excel in various skills not only to create a learning opportunity but to also establish personal networks that can be used for support in the attendees' HR practice or business. Executives will address the attendees during a moderated (fireside chat format) discussion giving personal examples and thoughts on how inclusion contributes to the success of the company. Participants will be better equipped to act as inclusion ambassadors in their respective departments and organizations.

Learning Objective 1: What does it mean to be an inclusive organization?

Learning Objective 2: How can organizations ensure they are properly prepared and trained to manage a diverse work team and create an inclusive work environment?

Learning Objective 3: What are the key strategies to manage diversity, increase inclusion, and create culture based on respect?



Catherine (Cathy) Jacobson is a senior executive with over 30 years of experience leading organizations in a variety of healthcare sectors from insurance to academic medical centers, both for-profit and not-for-profit. Cathy has a demonstrated track record of financial acumen, turnaround success, merger and acquisitions and consistent improvement in market leading performance and growth.

Currently, Cathy is the President and CEO of Froedtert Health, a not-for-profit integrated delivery system with over \$2B of revenue located in Milwaukee, Wisconsin. In Cathy's seven years of leadership, she has led the organization to market leading growth and financial and operating performance significantly enhancing the local, regional and national recognition the organization.

Prior to joining Froedtert Health, Cathy spent 22 years at Rush University Medical Center in Chicago, Illinois, a \$2B academic medical center where she was responsible during her tenure for health plan finance and operations, corporate compliance and audit, and all financial functions and strategy development leaving the corporation as CFO, Treasurer and SVP of Strategic Planning. Cathy received her Bachelor of Science degree in Accounting from Bradley University in Peoria, Illinois and her CPA from

the State of Illinois. She also received an Honorary Doctor of Healthcare Leadership from the University of Wisconsin-Milwaukee.

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Dr. Shelton Goode is the president and chief executive officer of Icarus Consulting a veteran owned consulting firm that specializes in helping organizations create inclusive cultures that leverage diversity and inclusion for a competitive advantage. Icarus Consulting accomplishes this by developing strategies which enable their clients to attract, develop, and retain highly skilled talent from an emerging diverse workforce and, at the same time, enhance the engagement, knowledge, and skill of current employees. Dr. Goode is an executive with over 20 years of experience in business and higher education. He has held executive HR and D&I positions for companies ranging in size from \$500M to \$1.1B+ and has developed or implemented talent management programs, performance management systems, sales incentive plans, labor relations strategies, and large-scale culture change initiatives. He received his bachelor's degree from Southwest Texas State University (now Texas State University) and his master's degree in Human Resource Management from Troy University. He obtained his Doctorate in Public Administration from the University of Alabama. Dr. Shelton Goode speaks nationally on a variety of public administration, human resource, ethics and diversity topics.

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## The Annual Legal Overview: Keeping Up with the Times

Bob Gregg, JD, Jennifer Mirus, JD; and Brian Goodman, JD

Wednesday, October 16, 2019

1:00 – 4:30 pm

**Room:** C and D

**Track:** Employment Law and Legislation

**Level:** All levels

**Competency:** Business Acumen, Resource Expertise



Bob Gregg, Co-Chair of the Labor and Employment Law Practice Group at the Boardman & Clark Law Firm in Madison, Wisconsin, has been representing employers for over 30 years in a wide variety of litigation, including discrimination claims, wage and hour suits, FMLA, ADA, equal pay, employment contract and Unemployment Compensation cases. He has designed the employment handbooks and effective workplace policies and procedures for numerous private and public employers. Bob is an honors graduate of West Virginia University Law School.



Jennifer S. Mirus is a partner and Co-Chair of the Labor and Employment Law Practice Group at Boardman & Clark LLP in Madison, Wisconsin. Jennifer represents employers in all aspects of employment relations, including hiring, discipline and terminations, wage and hour issues, discrimination, ADA, FMLA, and harassment. Jennifer also has extensive experience negotiating and drafting employment contracts, non-compete agreements, and employee handbooks. Jennifer's experience also includes conducting workplace investigations and human resources and management trainings for clients of all sizes. Jennifer is an honors graduate of the University of Wisconsin Law School.

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Brian P. Goodman is an attorney and a member of the labor and employment and school law practice groups of Boardman & Clark LLP. He graduated from the University of Wisconsin Law School, magna cum laude and was elected to the Order of the Coif. Mr. Goodman currently serves on the board of directors for the Greater Madison Area Society for Human Resource Management as the Director of Professional Development Summits.

HR professionals are constantly challenged to keep up with the ever-changing workplace, employment laws, and technology. This program will bring you up to speed on key recent developments in areas of importance for Wisconsin employers and provide the opportunity for questions and answers. The program will highlight three areas:

## **Legal Update and Lessons from the Past Year – Bob Gregg**

This session will address key developments of the past year, trends and issues for the future, including:

- Recent laws and new regulations affecting your operations.
- A review of the most important Supreme Court and Wisconsin employment-related cases.
- Other significant employment law cases, including the “most unusual cases of the year.”
- Coming attractions and trends you should be ready for.
- Best practices and practical guidance.

## **Avoiding Legal Traps in Employee Handbooks – Brian Goodman**

All experienced HR professionals understand the importance of an employee handbook. A handbook is only effective if it fits the employer. Does your handbook account for all applicable state and local laws? Have you added well intentional language which bites back for additional liability? Wage language can create un-intentioned “contracts.” Have you fallen into a “policy trap”. Using a variety of real life horror stories, this program will identify the legal traps that might lurk within your employee handbooks and practical advice to avoid problems. Learn about:

- Provisions you try to apply to former employees in a handbook that no longer applies to them.
- The dangers of copying and pasting from other employers’ handbooks.
- Failing to provide sufficient discretion to deviate from policies when appropriate (how to draft for effectiveness and flexibility).
- Most common TRAPS and how to avoid them.

## **Avoiding Key Wage and Hour Pitfalls - Beyond the Basics – Jennifer Mirus**

We all know that there are many “picky” laws in the HR arena, and wage and hour laws are no exception; FLSA, Equal Pay Act and others. This program will address key wage and hour issues and will help you spot your pay practices that may need some fine tuning. From the new salaried exemption rules, to properly calculating overtime, training time, on call time, pay deductions and especially the newest special audit focuses of the Dept. of Labor, DWD and the courts, this program will set you on the course to avoid many of the most problematic and costly wage and hour errors.



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**Firing Without Fear**

Mark Johnson

Thursday, October 17, 2019

6:30 AM to 7:30 AM

**Room:** F

**Track:** Employment Law and Legislation

**Level:** All Levels

**Competency:** Human Resource Expertise

The easiest lawsuit to defend is the lawsuit that is never filed. This session will discuss best practices before and during employment terminations, and will prepare you for the unexpected. Topics will include: the questions you should ask before discharge, good and bad evidence of the reason to terminate, the termination meeting, the effects of not firing a problem employee, and post-employment issues. If you must make the decision or provide final input into a termination decision, this session will provide you with valuable information to eliminate the fear of firing when it is appropriate and to handle terminations lawfully and effectively.

Learning Objective 1: This program will enable you to put what can often seem like chaotic circumstances into a framework that will help you proactively manage the issues and confidently address the situation.

Learning Objective 2: This program will help you understand important legal and practical concerns that you should address before discharging an employee.

Learning Objective 3: This program will help you communicate with your stakeholders about discharge decisions in a way that helps them understand the considerations that must be taken into account when making a decision about whether to discharge an employee.

Mark A. Johnson has a wide range of experience representing employers in matters involving labor and employment law. Mark has represented employers in hundreds of cases in federal and state courts and before federal and state administrative agencies in Wisconsin and throughout the country. Mark is a frequent speaker on topics related to litigation and labor and employment law. Mark's areas of focus include wage and hour, hiring and discharge, arrest and conviction record, employment contracts, covenants not to compete, downsizing, fiduciary duty of loyalty, non-disclosure agreements, employee handbooks, harassment claims and investigations, retaliation, union organizing, unfair labor practices and arbitration. Mark is admitted to practice in Wisconsin and before numerous courts, including the U.S. District Courts for the Eastern and Western Districts of Wisconsin, the U.S. District Court for the Northern District of Illinois, the U.S. Court of Appeals for the Seventh Circuit, and the U.S. Supreme Court.

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**Is Your Organization Paying Fairly?**

Mariann Madden

Thursday, October 17, 2019

6:30 AM to 7:30 AM

**Room:** Guava/Tamarind

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Ethical Practice

Organizations are at various points of the pay equity spectrum. Some are just beginning to set their objectives for their analysis, while others have posted their findings to their website in an effort to be more transparent. This session will provide insights into the current business and legislative landscape, key considerations in setting the overall objectives for your pay equity analysis, understanding how to structure your analysis and remediation strategies as well as what comes next.

Learning Objective 1: Gain insights into the current business and legislative landscape.

Learning Objective 2: Hear about the key considerations in setting the overall objectives for your pay equity analysis.

Learning Objective 3: Learn how to structure your pay equity analysis.

Mariann Madden is a Rewards Director based in Willis Towers Watson's Chicago office. She has over 20 years of experience as an advisor to external clients, organizational leaders and internal practitioners on global total rewards and organizational development matters.

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**Collegiate Design: The New Driver for Corporate Design**

Jonathan Webb and Brett Shwery

Thursday, October 17, 2019

6:30 AM to 7:30 AM

**Room:** G

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Consultation

This program reviews a 5-year research project intended to prove the hypothesis the corporations should address today's workstyles by taking design and workplace planning cues from institutions of higher education because of the importance that learning environments have on the new graduating workforce. Simply put, if an organization wants to attract and retain talent, it would be wise to understand the environments these individuals have "worked" in the last 4-6 years of their lives.

Jonathan Webb is KI's Vice President of Workplace Strategy. He leads KI's strategic business unit, serving the business market. Jonathan studies workplace trends, uncovers product gaps and develops solutions with the KI team. Jonathan takes part in advanced workplace strategies and documents his findings through white papers, articles and other publications. Partnering with thought leaders like AECOM, his publications cover diverse subjects including sit/stand benefits, designing training environments and defining work styles. Jonathan holds an MBA from the University of Wisconsin-Oshkosh School of Business and is a LEED accredited professional.

Brett Shwery is Senior Vice President for AECOM's Corporate Workplace practice and also leads the firm's Interiors practice throughout the Americas. With more than 30 years of design industry experience, he has worked with key executives across multiple geographies for companies such as Eli Lilly, Oracle, IBM, AOL, Warner Bros., Novartis, Star Alliance, Toyota and Nissan Motor Corporation to develop innovative design strategies focused on client vision, team creation and unique design and delivery models that strengthen business and corporate real estate portfolio objectives.

Brett is a past chairperson for the American Institute of Architects Interior Architecture Committee, Los Angeles Chapter and was one of the original founders of the committee's Student Competition. He is a recipient of the University of Southern California's (USC) Architectural Guild Service Award by a Board Member for outstanding service, has been recognized by the ANEW Foundation as a Stewardship Champion for Social and Environmental Sustainability and is an active member of CoreNet Global and IIDA.

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### **The Future Of Work: Making it Real for Your Organization**

Tricia Collins Schmidt

Thursday, October 17, 2019

6:30 AM to 7:30 AM

**Room:** Portia/Wisteria

**Track:** HR Technology

**Level:** All Levels

**Competency:** Business Acumen

The world of work is continuing to change at rapid speeds. We are expecting the use of automation to nearly double in the next three years and all HR professionals need to consider how changing technology, an all-inclusive global talent market and human/machine collaboration are going to impact their organization. Willis Towers Watson has been helping HR organizations solve for how, where and by whom work gets done in the future, including by robotics and artificial intelligence.

Learning Objective 1: During this discussion we will provide examples of the real-life roles and tasks that we have recently deconstructed and reconstructed using automation, RPA and machine learning in order to mitigate risk, reduce the impact of turnover, and free up talent for more value add activities.

Learning Objective 2: We will also discuss HR's role in leading the way for the Future of Work.

Learning Objective 3: Learn how technology is changing the way we work and what steps organizations can take to stay ahead.

With over 20 years of industry experience, Tricia is responsible for overall client satisfaction and delivery of our configurable benefit solutions to meet the unique needs of each organization. As a national leader, she advises our teams on how to deploy a holistic approach to health and benefits design and delivery using our deep market insights to develop cutting edge strategies and solutions that benefit both employers and employees.

As the Midwest Region Middle Market Leader, Tricia leads a team of over 200 colleagues in the areas of brokerage and advisory services with a focus on financial plan management, regulatory and compliance issues, talent management and benefits delivery.

Tricia joined Willis Towers Watson's Health and Benefits Practice in 2010. As a dynamic speaker, Tricia has been a featured at the Conference Board, Retail Symposium, Argentum Senior Living Conference, WTW Annual Growth Conference, and our Exceptional Producer Council. She has spoken at several conferences on Employee Benefit Captive Programs, the Dynamic Changing Workforce, Private Exchange Strategies and International Benefits and Global Risks. Tricia participates in the North American Sales Council and completed the Global Client Acumen Program.

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### How to Guard Employee Data in a World of TMI

Sarah Fowles, JD and Janice Pintar, JD

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** B

**Track:** Business Acumen and HR Strategy

**Level:** Early Level

**Competency:** Critical Evaluation

HR professionals guard a precious asset: employee data. Google searches, Facebook peeks and more sophisticated workplace monitoring tools mean that employers have more employee data to use and safeguard than ever before. Do you know what data you can and cannot share and with whom? Join Associated Benefits and Risk Consulting as they present the best practices for guarding employee data while navigating these new HR issues in the digital age.

Learning Objective 1: Learn best practices for protecting confidential employee information.

Learning Objective 2: Identify situations where you can safely share employee information with people outside of HR and outside of your company.

Learning Objective 3: Understand the pros and cons of gathering employee information through internet sleuthing and workplace monitoring.

Sarah Fowles is a Senior HR Consultant with Associated Benefits and Risk Consulting. She provides employer-focused guidance on human resources matters and aims to distill the complexity of employment laws into understandable action items that meet a client's business goals.

Janice Pintar litigated employment law cases for nearly thirteen years joining Associated Benefits and Risk Consulting as a consultant. Janice advises Human Resources professionals on a broad range of employment issues including respectful workplace practices, unlawful harassment avoidance, as well as federal and state discrimination and anti-retaliation issues.

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## **Marijuana and Drug Testing Update: What to do About Weed at Work**

Terri Dougherty, SHRM-CP

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** G

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Business Acumen

Marijuana laws are changing, and illegal drug use is rising. This makes it a continual challenge for employers to have a drug-free workplace and keep policies and procedures in compliance with the law. Learn how to support a safe, productive workplace while complying with federal and state regulations and preparing for changes that may be on the way.

Learning Objective 1: Trends in state marijuana legalization and how this affects employers.

Learning Objective 2: Keeping your substance abuse policy and drug testing practices up-to-date.

Learning Objective 3: The workplace impact of substance abuse and how to effectively deal with it.

Terri L. Dougherty, SHRM-CP, PHR, is a Human Resources Editor at J. J. Keller & Associates, Inc., in Neenah, Wisconsin. Terri speaks often about marijuana and drug testing and answers employer questions relating to these topics. She enjoys staying on top of these ever-evolving issues.

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**Mastering Delegation: Leveraging Your Staff's Talents for Great Results**

Jeffrey Russell

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** H

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Relationship Management

Delegation is a powerful but often misunderstood tool that enables you and other managers to leverage the talent, passion, and creativity of others into great results. But realizing its power depends upon understanding some fundamental principles, establishing some initial conditions, and then structuring the delegation relationship around five key questions. Attend this session to learn the basics about something we often take for granted but rarely use to its greatest potential. You'll learn how to answer the "what's in it for me?" question that every delegatee has and how to delegate without being seen as just dumping work on others.

Learning Objective 1: Describe what delegation is and how it's different from everyday task assignment.

Learning Objective 2: Define the critical initial conditions to ensure that you've chosen the right task, at the right time, to the right person, for the right reason.

Learning Objective 3: Apply the five key delegation questions to enable a successful delegation outcome.

Jeffrey Russell specializes in helping organizations respond to the challenges of continuous change. His business focus is on leading change, employee engagement, strategic thinking, leadership development, and performance coaching. Jeff is a frequent presenter at national and international conferences including past WISHRM State Conferences and the Jamaica Employer's Federation Conferences.

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### **Mega Session: Culture and Change – Leaders Sharing the Road to Success**

Tina Schuelke Facilitator, David Bryant, April Hershman, Jay Schneider, and Lori Namur  
Thursday, October 17, 2019  
10:15 AM to 11:30 AM

**Room:** 1 & 8

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

Corporate Culture is one of the major influences on whether organizational, process, and behavior change is successful. Most changes at work require the support of a culture that has a competency for change, and many leaders are focusing on culture transformation to sustain growth during an escalating pace of change driven by innovation, technology, and economic influences. An organization's culture is one of the most difficult leadership challenges. That's because an organization's culture comprises an interlocking set of goals, roles, processes, values, communications practices, attitudes and assumptions. ***Learn from our panel of experts about what is working and what gets in the way regarding culture and change.***

David is currently managing global programs for OD and Change at Kohler Co. Using his 15 years of HR Business Partner experience across many different industries, he is currently facilitating the cultural evolution at Kohler.

April is the Director of Organizational Change Management at Oshkosh Corporation. She focuses on change leadership, people readiness, and sustainment as key ingredients for any successful initiative. April is a Certified Change Management Professional (CCMP™), is Chair-Elect WI Leadership Board for American Cancer Society and holds a liberal studies degree.

Jay Schneider is President of Lake Country Manufacturing (LCM) and LC Power Tools (LCT) in Oconomowoc, Wisconsin. Jay is the second-generation leading LCM with the vision of *Innovation to Make Life Easier* among all aspects of the businesses, from experiences for their customers to improvements for their employees.

Lori has 12 years of change management experience where she led Fortune 500 companies through change, specific to enterprise-wide transformations. Lori's focus was on the people impacted by new processes and technology – helping employees, vendors, and customers embrace change through communication, education, and training, during major organizational change.

Tina Schuelke, founder and Executive Director of Change Management Communications Center LLC (CMCC), in Oshkosh, WI. Tina has led innovation, process, and behavior change in organizations for more than 30 years, advancing how leaders address change.



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### **Mobility/Recruiting Talent Panel Discussion**

Nadya Nahiriak-Hansen, Gail Johnson and Susan Thomson

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** A

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:**

Recruiter Perspective: Hiring Talent in today's climate, where to find talent, questions, making decisions, etc. HR person: Onboarding methods, expectations, set-up to successful. Retaining talent: growth in company, a voice, impact. Relocation Specialist: hiring talent from outside the area, many firms offer at no fee, relocation assistance as they explore a move to their community, helps them retain the talent to settle into position and community.

Learning Objective 1: Hiring is a criteria part of HR as they grow and retain talent. Every company is experiencing growth and/or talent leaving to replace. This panel can give tools, resources, recommendations, new ideas how to look at processes to consider to help them in their role.

Learning Objective 2: Panel discussion with a few overlapping questions can bring a new tool/idea to someone attending that speaks to them as it will offer many viewpoints that all play a role in their hiring and retention process.

Learning Objective 3: Thought provoking ideas will be shared to take back to their team to start a discussion on how their process may need some updates.

Nadya is the Director of the Relocation Division for Restaino & Associates Realtors. She is a licensed real estate agent and has been with Restaino & Associates Realtors since 1992. Her designations include the CRP, GMS and ASP. She sits on the Board of the WI Employee Relocation Council and Chairs the Marketing Committee for the Midwest Relocation Conference each year. She is a member of RDC, Wi ERC and Worldwide ERC.

Susan fell in love with manufacturing straight out of college, and spent nearly 25 years there, in companies like Fiskars with their famous orange-handled scissors, to SeaLand Technology's luxury toilets for yachts. She has a keen, first-hand sense of what teams, executives and businesses need to grow and maintain healthy cultures and profits as they scale. She's logged over 28,000 hours of coaching since 2007, and has helped hundreds business owners achieve their goals, and take their business to the next level. Her clients have achieved double, triple, and even one quadruple-digit growth in profitability, accomplished through improving sales, marketing, team training, systems development and strategic planning. She helps leaders grow from strong (solo) performers to real leaders with results-driven and profitable teams.

Moderator Gail Johnson has 25 years of sales & marketing experience in broadcast, internet, & magazine. Gail has taken her sales and marketing abilities to Restaino & Associates, Relocation for the last ten + years committed to serving employers enhancing their recruitment process, establish and grow relationships with corporations, our Realtors and relocating clients, to provide the best quality and reliable assistance. My role remains the same, helping businesses grow and people to prosper.

# Wisconsin SHRM State Conference October 16-18, 2019

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## **More is More: Trailblazing Benefit Trends for 2020 and Beyond**

Mardi Burns, Linda Evans and Dave Williams

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** F

**Track:** Total Rewards

**Level:** All Levels

**Competency:** Consultation

Employers face the challenging job of identifying the right employee benefit trends and implementing the most impactful strategies - at a time when the industry is changing rapidly around them. What are employees interested in? Which benefits are your HR colleagues having success with? In this session, we'll explore the trends and benefit strategies that can help you attract and retain the best talent while setting you apart from the competition. Hear from our experts and local Wisconsin HR professional about what actions you can take now to prepare for what's ahead.

Learning Objective 1: Identify top 3 challenges employers face when managing employee benefits.

Learning Objective 2: Learn which employee benefit trends are most valued by employees and can also help solve employer challenges.

Learning Objective 3: Develop strategies to help determine the employee benefit trends best suited for your organization.

Mardi has been active in the benefits industry for over 40 years. She provides solutions to employers with medium to large companies in the design, implementation and management of their employee benefits. Her specialties include employee communication, education and strategic benefit planning.

Linda is a seasoned HR professional with experience and knowledge in all facets of HR. Most recently, Linda has been highly involved in due diligence and integration of acquisitions, establishing the strategic direction in regards to cultural transformation, talent, benefits, and compensation.

Dave has been providing employee benefits solutions to clients since 2005. Prior to working in employee benefits Dave has extensive experience in underwriting management. He uses his experience in underwriting to analyze data and evaluate utilization trends to provide his clients with valuable employee benefits solutions.

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**Diamonds in the Rough: Internal Promotion Opportunities you are Likely Missing**

Dale Feinauer

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** C

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Business Acumen

First, we will focus on why we often place too much emphasis on formal education in the selection process. We will explore why parents' level of education is a better predictor of educational attainment than is intellectual capacity. We will discuss how educational attainment is used more as a measure of trainability than as an indication of what applicants know. Next the conversation will focus on how to identify employees with limited formal education that have the potential to move up. Finally, we will discuss how to manage professional development for and the benefits of developing these folks.

Learning Objective 1: Learn why formal education is not the only good measure of someone's development potential.

Learning Objective 2: Learn how to identify the "diamonds in the rough" that your organization is overlooking as potential future leaders.

Learning Objective 3: Learn specific tools for developing these individuals and the advantages to the organization of making this investment

Dale Feinauer received his Ph.D. in Labor and Human Resources. A human resources professor at The University of Wisconsin-Oshkosh since 1983, now serving as the Assistant Dean for MBA programs. Dale has: engaged in consulting for over 200 organizations and has conducted over 600 training seminars on five continents.

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## Successfully Launching Your Corporate Volunteer Program

Leah Thibodeau, Melissa Selig, and Lisa Strandberg

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** Guava/Tamarind

**Track:** Total Rewards

**Level:** All Levels

**Competency:** Relationship Management

Drawing from our experiences with both successful and unsuccessful attempts, we propose 6 key steps to launching your corporate volunteer program. Thinking about starting a program but now sure how? Or, already started a program but want to make sure you're on the right track? Join us for a great conversation.

Leah Thibodeau brings a background in HR to her role as a leader of volunteer engagement. Experience with several different corporate volunteer programs has helped her identify specific factors that lead to the success or failure of the plan. Leah is currently the volunteer program manager at St. Joseph Food Program in Menasha, WI, where 350 volunteers are led in their mission of fighting hunger and sustaining hope. As the president of Wisconsin Volunteer Coordinators Association, Leah connects with and supports volunteer engagement professionals from a variety of nonprofit agencies throughout the state.

Melissa Selig has been with American National Bank Fox Cities for 7 years as the Team Lead in the Loan Operations Department. She has always been driven to help people and stepped up 5 years ago when her management team dedicated themselves to giving back to the community in meaningful ways. Melissa brings tremendous experience in developing a program.

Lisa Strandberg is project director for InterSector (formerly known as Back Office Service Solutions, or BOSS). InterSector is a pilot initiative that connects nonprofits with business talent and services to increase social impact together. Launched in November 2018 with support from the J. J. Keller Foundation as well as U.S. Venture and Oshkosh Corp., InterSector explores three facets of nonprofit capacity-building: skilled volunteering, consultant vetting/project management, and shared services. Lisa brings to this work her engineering education and varied experience in corporate R&D, freelance writing and editing, and nonprofit development.

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## **Taking a New Perspective-Effective Communication with C-Suite**

Laura Piotrowski, SHRM-SCP

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** Portia/Wisteria

**Track:** Business Acumen and HR Strategy

**Level:** Senior Level

**Competency:** Business Acumen, Communication, Critical Evaluation, Relationship Management

HR professionals bring a crucial people perspective to their organization but face the challenge of conveying that perspective to the CEO and CFO who are focused on the business and financial results. Due to language difficulties HR's key proposals, ideas, initiatives and projects may not receive the attention or funding that they deserve.

This session will focus on practical approaches to bridge the gap between the people perspective and the business and financial perspective. Learn how to make the business case for HR initiatives and translate the HR ideas into a language that resonates with the C Suite.

Learning Objective 1: Techniques to tailor your conversations to achieve the best outcome

Learning Objective 2: Tools that can be used when making the business case for important people initiatives

Learning Objective 3: Strategies to bridge the gap between the "business perspective" and "people perspective"

Laura is an accomplished executive with over 25 years of experience. Laura's financial and human resource background gives her an ability to provide exceptional service to her clients, understanding their business issues and suggesting potential solutions while assessing the financial implications and risks. Laura founded Cavendish Consulting in 2017 focused on helping clients connect their business goals and the people responsible for executing on those goals through human resource strategies.

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### **The Good, the Bad, and the Ugly: Recent Developments on Independent Contractors**

Michael Gotzler

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** E

**Track:** Employment Law and Legislation

**Level:** Senior Level

**Competency:** Human Resource Expertise

The war against independent contracting has not abated, with both wins and losses for companies and contractors. Recent developments for companies using independent contractors include the "good" - a January 2019 NLRB decision broadening the definition of independent contractor and a new Field Assistance Bulletin from the U.S. Department of Labor clarifying business practices that do not result in employment status; but also the "bad" - the California Supreme Court's decision in Dynamex tightening the IC standards. Compliance with the quickly growing law on independent contractors likely will remain "ugly" for years to come.

Learning Objective 1: Identify the key factors that place independent contractor relationships at legal risk.

Learning Objective 2: Understand the most important similarities and differences between the various federal and state laws that impact independent contractor relationships.

Learning Objective 3: Make and/or implement specific recommendations within your organization to take advantage of the current gig marketplace while minimizing worker misclassification exposure.

Michael Gotzler is Special Counsel in Littler's Madison, WI office. During his 20+ years of legal practice, Mike has been an in-house General Counsel and represented a wide range of employers. Mike has particular expertise responding to claims and issues involving joint and co-employment, third party workers, and independent contractors.

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**What are Participants Saving For? Visualize Retirement**

Todd Barden

Thursday, October 17, 2019

10:15 AM to 11:30 AM

**Room:** D

**Track:** Business Acumen

**Level:** All Levels

**Competency:** Business Acumen

Every company has to balance its aspirations for employee benefits with practical, financial realities. Focusing on financial wellness can benefit your organization from both a benefits perspective and a cost-focused perspective. There's a lot of talk about financial wellness, and the truth is that it can mean different things to different people. But where employers are concerned, financial wellness is now seen as an essential business element. Why? Because good things happen when employees have their finances under control: They are more engaged on the job, better able to save for retirement, less likely to switch jobs, and even physically healthier. Employers understand that workplaces function better when employees are financially fit. Providing employees with tools and techniques for managing financial stress can translate to a more productive workforce. And, frankly, that's good for everybody.

Learning objectives will include identifying needs of your employee base, understanding the ROI on Financial Wellness, and best practices surrounding implementation.

Todd Barden is a Corporate Retirement Director and has been working closely with Plan Sponsors to help American workers retire with dignity since 1990. "Helping people retire successfully is not just a job for me, but a passion. When employees are better prepared for retirement, I believe everyone wins: your company, your employees, and society."

Todd has earned the significant industry designations of Certified 401(k) Professional (C(k)P®), Certified Financial Planner (CFP®) and Accredited Investment Fiduciary (AIF®). The C(k)P® designation represents the pinnacle of achievement for professional retirement advisors. Todd received the C(k)P® designation through the Retirement Advisor University (TRAU) in collaboration with UCLA Anderson School of Management's Executive Education Program. Todd utilizes behavioral finance principles with assisting plan sponsors in their efforts to improve participant outcomes. Todd is an Adjunct Lecturer for the Plan Sponsor University (TPSU) leading interactive retirement plan fiduciary and management education.

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**Employees Mental Health and What Leaders Should Know**

Steve Baue

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** E

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Ethical Practice, Global and Cultural Effectiveness, Human Resource Expertise, Leadership and Navigation, Relationship Management

Seventy percent of employees are distracted every day by a “life” issue and 25% would benefit from seeking counseling. Take time to understand the real numbers behind mental wellness / health and its impact on the workplace. By demystifying mental health / illness - especially at work as well as understanding facts versus fiction, leaders can reduce the stigmas that creates barriers. When HR understands the what and how of mental health, they can enable a culture of productive, engaged employees who create better businesses and communities.

Learning Objective 1: Understand the facts of mental wellness/health at work, including legal liability.

Learning Objective 2: Gain tangible and practical steps to engage and show care for your employees.

Learning Objective 3: Identify and create awareness for the mental health resources available.

Steve has more than 25 years of domestic and international experience in organizational development, human resources and executive-level leadership. Prior to Steve purchasing ERC in 2014, he was an executive at Milwaukee-based Joy Global Inc and was the Vice President of Human Resources for Fincantieri Marine Group USA.



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## Top 10 Ways to Avoid HSA Headaches When Implementing HSAs

Susan Sieger

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** F

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Human Resource Expertise

Health Savings Accounts (HSA) continue to gain in popularity. HSA implementation will run smoother if you understand the compliance issues that may arise up front. In this session, you will learn the top 10 ways that you can make HSAs part of your benefit strategy and avoid HSA headaches! Who is eligible for HSAs? What benefits are compatible with HSAs and what you need to structure plans to preserve HSA eligibility? What is disqualifying coverage, how does the Health Flexible Spending Account (FSA) rollover and grace period impact HSA eligibility and more!

Learning Objective 1: Who is eligible for HSAs and what are the contribution rules?

Learning Objective 2: What is disqualifying and permitted coverage and which benefits are HSA compatible?

Learning Objective 3: Through case study, learn how to use stacking techniques for FSA, HRA with HSAs and at the same time remain in compliance and expand tax advantages

Sue Sieger has over 25 years of experience in the employee benefits industry. As senior compliance consultant at Employee Benefits Corporation, she has worked with thousands of employers and has become a leading specialist in employee benefits. Ms. Sieger is a frequent speaker on employee benefits both locally and nationwide.

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## **Making Big Data Practical for the Small-to-Mid-Sized Organization**

Dan Ritter

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** B

**Track:** HR Technology

**Level:** Mid-Level

**Competency:** Human Resource Expertise

Big data is all around us, and that includes the world of HR. Organizations today use data to do things like improve recruitment efforts, increase employee engagement, and reduce turnover. There are dozens of analytics tools out there, but many of us in small/mid-sized organizations do not have the time or budget to continuously adopt the latest and greatest technology. What do we have instead? Excel: the most widely used analytics tool in the world! In this practical session, we will explore big data concepts and apply them to small scale enterprises using commonly available software. Get the most out of the tools you already have.

Learning Objective 1: Understand the potential rewards and pitfalls of using excel for generating HR intelligence.

Learning Objective 2: Learn how to structure your data to reduce errors and maximize productivity.

Learning Objective 3: Learn how to apply big data concepts to common HR metrics and calculate ROI of HR initiatives.

Dan is a people-loving data-geek, a rare creature indeed. As Director of People Analytics for illumyx, his passion is creating data solutions that drive organizational change.

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## **Mega Session: HR's Strategic Role in Accelerating Business Transformation**

Michelle Moore

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** 1 and 8

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Business Acumen, Global and Cultural Effectiveness, Human Resource Expertise

In today's disrupted, fast-paced and rapidly evolving world, continuous improvement and change are no longer enough to keep organizations customer-relevant and competitive. Continual transformation and innovation is the new normal and people need different mindsets and skillsets to accomplish business goals and succeed personally. This session describes how companies are working to transform their business (and workforces) and how HR leaders can help accelerate that transformation.

This session will be a facilitated, interactive workshop where participants will discuss the difference between change and transformation, the typical barriers and enablers to transformation, cultural characteristics required for innovation and the people capabilities required to succeed.

Learning Objective 1: Differentiate between change and transformation.

Learning Objective 2: Identify the people capabilities required to lead and productively participate in successful transformation.

Learning Objective 3: Review typical barriers and enablers of successful transformation and HR's role in navigating them.

Michelle Moore is the Global Practice Lead – Change and Transformation for Lee Hecht Harrison. Michelle has worked globally for over 25 years with leaders to help them improve business results by addressing common challenges like change management, team effectiveness, business transformation and innovation.

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## Navigating the New Normal

Patti Dunning

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** Guava/Tamarind

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Business Acumen

Amid a continuously shrinking talent pool, the rising power of workers has created new challenges for employers. With demands that go well beyond traditional concerns about pay, benefits and work/life balance, business leaders today must adjust to worker expectations relating to business practices, transparency, diversity and inclusion and more. Steeped in more than 20 years of research into the motivations and beliefs of the American workforce, the Emerging Workforce® Study, commissioned by Spherion, offers insights to inform new approaches to the array of challenges in how to effectively recruit, engage and retain the talent needed to grow and prosper.

Learning Objective 1: Why shifts in where and how work is performed can influence corporate culture, communications and collaboration.

Learning Objective 2: How to boost the value of an employer brand and create a strategic talent advantage through new approaches in areas such as training and development, community outreach and diversity and inclusion.

Learning Objective 3: What drives optimal levels of employee engagement and retention.

As a senior vice president of Spherion Staffing Services, with more than 25 years of experience focused on operational excellence and business development, Patti supports Spherion franchise business owners in more than 50 U.S. offices. Her guidance enhances their ability to partner with clients to build a high-performance workforce.

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## Privacy Concerns in Today's Technology Based workplace

Stephanie Tripoli and Matt Kurlinski

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** C

**Track:** Employment Law and Legislation

**Level:** Senior-Level

**Competency:** Communication, Consultation, Human Resource Expertise, Relationship Management

Rapidly changing technology continues to transform the workplace. Today's employers face a wide array of privacy concerns as e-mailing, texting, blogging and social networking become routine activities in the workplace and wearable technology continues to advance. Employers have an increasing amount of sensitive data to protect and a variety of legitimate business reasons to monitor employees. However, employees do not check all of their privacy rights at the door. This presentation discusses evolving technology and the legal implications of monitoring employees including email, social media, off duty conduct, and wearable technology.

Learning Objective 1: Understand an employer's ability to discipline employees for their off-duty conducts.

Learning Objective 2: Understand the growing concerns privacy technology poses in the workplace.

Learning Objective 3: Understand employee's privacy rights.

Stefanie Tripoli is an Associate with the law firm of Littler Mendelson. She has successfully represented employers before various federal and state agencies, including the National Labor Relations Board, Department of Labor, Equal Employment Opportunity Commission, and the Department of Workforce Development. Stefanie also routinely counsels employers on workplace compliance issues related to the National Labor Relations Act, union organizing, collective bargaining agreements, the Wisconsin Fair Employment Act, the Americans with Disabilities Act, the Fair Labor Standards Act, the Family and Medical Leave Act, and Title VII of the Civil Rights Act.

Matthew W. Kurlinski is an attorney in the Milwaukee office of Littler Mendelson, P.C., the largest law firm in the world exclusively devoted to representing management in employment, employee benefits, and labor law matters. Mr. Kurlinski, who is admitted to practice law in Wisconsin and Ohio, represents clients in state and federal courts, as well as before federal, state, and municipal administrative agencies. In addition, as a trusted advisor to his clients, he provides advice and counsel concerning a wide range of complex legal issues related to employment law, employment litigation, human resources, employee relations, workplace investigations, corporate security, and risk management. Mr. Kurlinski is also a frequent speaker on advanced elicitation and interviewing skills as well as tactics for assessing employee truthfulness.

Prior to joining Littler, Mr. Kurlinski was an attorney in the labor and employment relations practice group at a large regional law firm. In addition, he spent almost ten years with the U.S. federal government working predominantly overseas in a variety of roles related to national security and transnational issues.

Besides his active membership in the American Bar Association, the State Bar of Wisconsin, and the Milwaukee Bar Association, Mr. Kurlinski is a Board member for College Possible Milwaukee, a non-profit organization dedicated to making college admission and success possible for low-income students through an intensive curriculum of coaching and support.

Mr. Kurlinski earned his J.D. from Case Western Reserve University School of Law in 1997 and his B.A. from Miami University in 1994 (Phi Beta Kappa).

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## 5 Steps to Your Best Open Enrollment Ever

Misty Guinn  
Thursday, October 17, 2019  
12:45 PM to 2:00 PM

**Room:** G

**Track:** HR Technology

**Competency:**

**Level:** Midlevel

**Competency:** Human Resource Expertise

Open enrollment is the Super Bowl of the benefits profession. In this session, you'll get the insight you need to start developing a winning strategy now. Hear from fellow employers in the area as they share their top considerations for enhancing the entire open enrollment experience.

Learning Objective 1: Identifying process improvement opportunities to save time and money

Learning Objective 2: Balancing employee needs and expectations with budget goals

Learning Objective 3: Supporting year-round benefits education to drive more informed decisions Additional

Misty Guinn is the director of benefits and wellness at Benefitfocus, where she works closely with suppliers and carriers to create and manage innovative health plan designs for associates. She's dedicated to helping others improve their total well-being through education, relationships and a supportive environment that includes innovative employee benefits strategies and well-being programs that foster foundations of a healthier workforce and community. Misty is a certified worksite wellness specialist with the National Wellness Institute and a Franklin Covey Facilitator in the 7 Habits of Highly Effective People.

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## **Strategic Recruiting in a High Demand Market. You Still Don't Get It**

James Morgan

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** H

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Human Resource Expertise

Five to 10 years ago, HR professionals were focused on keeping health care costs down, ensuring positions were filled, and that their management team was on schedule with annual performance reviews. Today, HR professionals face an avalanche of different issues that they could never have imagined including: talent shortages, stagnant wages, harassment issues, substance abuse, conflict management, workplace violence, gender equality, pay transparency, generational differences/divides, and much more. If you think your job as an HR professional hasn't changed much, you're greatly mistaken. Here are the things you need to be thinking about and preparing for in today's workforce, and MRA has the information and expertise you need to be able to face these issues and deal with these situations.

Learning Objective 1: Understand the seismic shifts taking place in the HR field and what is causing them.

Learning Objective 2: Learn what successful companies are doing to maintain a talent supply chain.

Learning Objective 3: Understand additional changes taking place in the near future and how you can prepare.

Jim has facilitated strategic planning for businesses, local chambers, and economic groups, primarily around developing a talent pipeline for employers. He has provided keynote presentations for groups from 100 to over 1000. Audiences included CEOs, policymakers, educators, and students. Presentations are a mix of data, experiences, research, stories and humor.

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## **The Biggest Disasters are Rooted in the Best of Intentions: Diversity Initiatives in the Workplace**

Alonzo Kelly

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** D

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Leadership and Navigation

At this point the answer of 'why?' has already been asked and appropriately addressed as it relates to Embracing Diversity in the Workplace. The question that remains to be fully explained is 'how?' The term 'Diversity' no longer has a universal meaning and recognizing one group has come with the risk of omitting another. This session will explore a few best practices from large and small organizations that appear to be creating inclusive environments being well received by all.

Learning Objective 1: Explore activities and initiatives from other organizations that may be rhymed in the participant's place of business.

Learning Objective 2: Identify, understand, and articulate terms, phrases, and activities that unintentionally divide, rather than unite, the workplace.

Learning Objective 3: Enhanced ability to formulate a Diversity Strategy that is cognizant of those within the organization, in the community, and those served by good and services we produce respective to our organization.

Alonzo is a dynamic Executive Coach, 3x Best-Selling Author, and recognized as a premier strategist on leadership development, strategic thinking, and organizational goal achievement. He holds a bachelor's in Accounting, three master's degrees (PA, HR, BA), and nearing completion of a PhD in Multidisciplinary Human-Services and Doctorate in Business Administration.



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## **The Culture Choice: Building a Culture by Design**

Jeff Nischwitz, JD

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** Portia/Wisteria

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Global and Cultural Effectiveness

Everyone talks about wanting to create a culture, but the truth is that every organization already has a culture. The only question is whether it's a culture by design or a culture by default. Too often, team members are looking up (to leadership) to define the organization's values and culture, but every team member has the opportunity to design, develop, nurture and sustain the culture (or kill it). Jeff shares his unique perspective on theme of building a culture by design, along with his innovative ideas on designing and nurturing culture where every team member is empowered for impact. Join us and get implementable tools for guiding and impacting the culture in your organization. Get ready to shake up your culture, your team and your impact!

Learning Objective 1: Help HR professional differently understand the foundations of building sustainable cultures.

Learning Objective 2: Identifying and demystifying culture myths and killers for HR professionals.

Learning Objective 3: Arming HR professionals with actionable culture shifts to improve team and organization effectiveness, influence and impact.

Known as a Snow Globe Shaker, Jeff is on a mission to help people shift how they lead. An international leadership, team engagement and culture speaker, Jeff's known for his unique perspectives, challenging traditional thinking and delivering tangible shifts to help organizations grow leaders and build engaged and empowered teams.

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## **Vinegar, Honey, and Change: Communication Imperatives for Leading Change**

Tina Schuelke

Thursday, October 17, 2019

12:45 PM to 2:00 PM

**Room:** A

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Communication

Do your communications about change land like an invitation or a shove? Effective Change Communications reach beyond engagement, support behavior changes, and prioritize activities:

- get buy-in
- build trust
- engage conflict
- commit to results
- stay accountable
- focus on collective results
- reinforce changes

Know when and how to use Vinegar and Honey in your communications about change. Compliment project management with communications that win the hearts, minds, and commitment of stakeholders involved with change. Drive engagement and trust in the project to move the team forward. Be better prepared to deliver sustainable returns on investment for changes you lead.

Learning Objective 1: Help HR professional differently understand the foundations of building sustainable cultures.

Learning Objective 2: Identifying and demystifying culture myths and killers for HR Professionals.

Learning Objective 3: Arming HR Professionals with actionable culture shifts to improve team and organization effectiveness, influence and impact.

Tina Schuelke: founder and Executive Director of Change Management Communications Center LLC (CMCC), in Oshkosh, WI. Tina has led innovation, process, and behavior change in organizations for more than 30 years, advancing how leaders address change. CMCC is recognized as a top 21 influencer to follow on Twitter @cmcCenter.

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**Coaching as a Management Style: Be More Effective with Less Effort**

Darcy Luoma, CPCC, MCC, BCC, ORSC

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** A

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

Are you curious what coaching is all about? Are you looking for strategies to be more effective in managing your employees? Coaching is an approach to management that moves from the traditional role of controlling and monitoring employees to developing a partnership that challenges and develops employees. This dynamic session will explore the core principles of coaching as an effective style, leading to more engaged employees and greater results. Experience first-hand how to ask thoughtful questions to create new awareness and build an environment of open communication, collaboration, and accountability.

Learning Objective 1: Participants will practice the coaching strategy of asking questions in order to build trust and accountability with employees.

Learning Objective 2: Participants will identify their personal management style and learn when and how to shift to using coaching skills.

Learning Objective 3: Participants will learn about Darcy Luoma's leadership model, Thoughtfully Fit, and how it can help them be more effective with less effort.

Darcy is a Master Certified Coach, dynamic facilitator, and professional speaker. She has her Master's in Organization Development from Pepperdine University and leads Darcy Luoma Coaching & Consulting, which creates high-performing people and teams through coaching, speaking and consulting. Beyond business, Darcy enjoys raising her energetic daughters and competing in triathlons.

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**D&I But Why? Creating a Diversity Strategy**

Kendra Dodd, SPHR, MHRD, SHRM-SCP

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** H

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Human Resource Expertise

Everyone agrees that D&I is the right thing to do, and it's even profitable (we can prove it)! So how do you implement a D&I program into your organization? The "D" part is actually the easy part! The tougher part of the equation is the "I", creating a culture of inclusion in your organization. A cultural shift of this magnitude is hard for everyone in an organization to get their arms around and embrace the concept. It takes a fundamental shift to get employees to realize that by including people with diverse backgrounds and ideas, you actually get more creative, innovative ideas that help an organization solve some of its toughest challenges. MRA has the experience to help organizations make this seismic transition and we will share with the audience how to do this.

Learning Objective 1: Understand the value and advantages of a diverse workforce.

Learning Objective 2: Learn how to develop an organizational culture of inclusion.

Learning Objective 3: Learn strategies to show your employees why diversity of people leads to diversity of ideas.

Sought after presenter and coach regarding process improvements, culture dynamics, and personal improvement, Kendra understands the importance of development and has a passion for continuous learning. She loves gaining knowledge, often jesting that she never progressed out of the "curiosity stage". Her dynamic enthusiasm is evident in her training.

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### **Different Generations, Different Needs: Finding the Right Employee Benefits Strategy**

Marybeth Herbst-Flagstad, J.D., M.A.

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** F

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Relationship Management

The challenge is unprecedented: four generations in the workplace with different values, needs and expectations. Is your employee benefits strategy comprehensive and sophisticated enough to attract and retain workers from all generations in the workforce - and hold your ground in the war for talent?

Join us for a panel discussion of the different employee benefits best suited for each generation's needs, effective communications strategies, and how to make every employee, regardless of age or experience, feel valued and engaged to build a lasting, loyal, and productive workforce.

Learning Objective 1: Recognize which needs are important to each generation of workers and identify corresponding employee benefits.

Learning Objective 2: Learn how to build and support cross-generational relationships in the workplace.

Learning Objective 3: Learn best practices to recruit and retain employees across all generations.

Marybeth is an accomplished corporate counsel and consultant skilled in enterprise risk management through devising and implementing practical solutions to complex regulatory, compliance, and litigation concerns. Her clients have commented that she is an effective, creative developer of business practices in a variety of industries, especially their HR needs.

# Wisconsin SHRM State Conference

## October 16-18, 2019

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### HR Trends in the Current Economy: 2020 Outlook

Tara Conger, SHRM-SCP, PHR and Summer Rector, SHRM-SCP

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** G

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Business Acumen

QTI's annual survey of Wisconsin organizations highlights the struggles with attraction, retaining, and motivating people in 2019 and the outlook for 2020. In this session, QTI will showcase the findings on HR trends and challenges facing WI organizations. QTI will provide actionable recommendations to help your organization reach its full potential through your people.

Learning Objective 1: Learn the top HR trends and what high performing organizations are doing to attract and retain talent.

Learning Objective 2: Learn the salary budget trends to budget appropriately for your 2020 payroll.

Learning Objective 3: Learn how your organization can enhance its HR practices to be more competitive in 2020.

Tara Conger, SHRM-SCP, PHR

Tara is the Chief Operating Officer of QTI's Human Resources Division and Employee Engagement Practice. QTI focuses on HR Consulting and has the pleasure of being the outsourced HR department for over 150 businesses. Tara enjoys being a strategic partner with QTI's customers by helping them find solutions and resources that will positively impact their business and help them to achieve key goals and objectives for their organization. Tara has over 15 years of business and HR experience and is SHRM-SCP certified.

Summer Rector, SHRM-SCP

As Chief Operating Officer of QTI's Total Rewards Consulting Practice, Summer leads a highly-talented team of experienced professionals who specialize in total rewards strategy, program design, and governance/administration best practices. Summer has a decade of compensation consulting and administration experience having worked for such organizations as Mercer, DayNine-Accenture, and Health Care Service Corporation. Summer graduated from the University of Wisconsin-Madison with a Bachelor of Business Administration degree in Management and Human Resources and is a Society for Human Resource Management Senior Certified Professional (SHRM-SCP).

# Wisconsin SHRM State Conference

## October 16-18, 2019

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### Managing State and Local Affirmative Action Requirements

Sally Makreff

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** E

**Track:** Employment Law and Legislation

**Level:** Mid-Level

**Competency:** Human Resource Expertise

The City of Madison has called to say your affirmative action plan is deficient! The State of Wisconsin wants an affirmative action plan today! And other states and localities want more information from you as soon as possible!

State and local units of government are becoming more active in requesting data and other information on the affirmative action practices of their vendors. In this program, we'll talk about the reasons this may be happening, how to respond when there is a request for affirmative action information, and how to ensure your organization stays ahead of these kinds of requests.

Learning Objective 1: Understand the types of requests state and local units of government make of their vendors for affirmative action information

Learning Objective 2: Learn how to respond (and how not to respond) to these requests for information

Learning Objective 3: Develop a plan for working with others at your organization to understand the importance of providing the right affirmative action information

Sally Makreff serves as the Vice President of HR Analytical Services and has worked in the affirmative action and equal employment opportunity field for nearly 20 years. She has an extensive knowledge of the affirmative action laws, not only at the federal level, but at the state and local levels as well. Sally consults with her clients on affirmative action compliance regulations and practices, develops customized affirmative action plans, provides strategic audit guidance and support, and conducts training on implementing affirmative action plans. In addition, Sally works with her clients to ensure that their employment policies, processes, and procedures align with their affirmative action efforts. Sally is a member of the Milwaukee Industry Liaison Group (ILG) and has been the co-chairperson for the Madison ILG for the past five years.

# Wisconsin SHRM State Conference October 16-18, 2019

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## **Mega Session: The One Choice Rule: Transform Your Life and Work by Changing your Mindset and Behavior**

Tracy Butz

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** 1 and 8

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

This powerful program is filled with groundbreaking insights and a tool for action to propel purposeful action toward behavior change. Learn how to develop impactful keynote habits that create a positive domino effect—individually, within teams, and across the organization. Discover the secret of how to control emotional reactions and empower personal accountability while learning how to influence choices and behavior change in others. Fuel breakthrough performance and achieve higher levels of productivity with *The One Choice Rule: One choice can change everything*.

- Positively influence choices, attitudes and collaboration—transforming individuals and organizations into more successful and higher performing teams.
- Foster engagement and higher levels of productivity through powerful keystone habits that lead to additional positive, unintended outcomes.
- Decrease defensiveness by preventing and/or better controlling negative emotional reactions—leading to healthier, stronger and deeper relationships with individuals both within and outside the organization.
- Cultivate an environment that encourages differing points of view, enhanced communication, fewer excuses and greater accountability.
- Influence behavior change in others by identifying the specific action, acknowledging his/her perspective, highlighting the benefits and exploring motivations without pushing

Tracy Butz is an engaging and inspiring Certified Speaking Professional® with 20+ years of experience with clients including the U.S. Army, Motorola and Subway. She is also a best-selling author, with her fifth book released in 2019. Tracy's focus is helping you make positive behavior changes in life and work.



# Wisconsin SHRM State Conference

## October 16-18, 2019

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### **People Analytics: Adding some Crunch to Your Soft Skills**

Stephen Utech and Dan Ritter

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** D

**Track:** HR Technology

**Level:** Mid-Level

**Competency:** Human Resource Expertise

When trying to get a handle on retention trends in your organization, what variables should be taken into consideration? Employee engagement metrics? Performance review scores? There are plenty to choose from: some predictive models use more than 50 unique variables to assess turnover risks! It's no wonder many of us feel overwhelmed when starting to integrate data into people processes such as hiring, onboarding and retention. In this session we will provide a broad overview of what people analytics is and we'll share a general framework you can apply to make better decisions at any stage of talent lifecycle management.

Learning Objective 1: Understand what people analytics is and how to build a business case for it in your organization.

Learning Objective 2: Think through steps of how to strategically build your people analytics team.

Learning Objective 3: Work through a practical example of how to apply people analytics to retention.

Steve's background in the hard sciences and family dynamics inspired him to combine data and people as he entered the field of culture development 10 years ago. An entrepreneur at heart, he has spent the past 5 years developing illumyx, giving companies means to objectively measure and improve their culture.

Dan is the Director of People Analytics at illumyx, using data to help clients understand how teams get work done and how to optimize organizational culture.

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## Planting Seeds of Change

April Hershman, CCMP and Jenny Sabo

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** B

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Global and Cultural Effectiveness

Planting the Seeds of Change pays homage to the idea that planting seeds is an intentional act in order to bring about growth. Seeds that sow, are proof that change is possible. Yet business research indicates that only 30% of change efforts succeed within companies. Imagine if only 30% of a crop yielded results. How would this translate to employee turnover, burnout, change leadership, unmet return on investment, or missed realization of change objectives? Oshkosh Corporation will share their journey about planting seeds to cultivate the people side of change and its impact on organizational culture.

Learning Objective 1: Participants will be able to distinguish the difference between the mechanical side of change and the people side of change.

Learning Objective 2: Participants will be able to recognize the connection between organization culture and history of change results.

Learning Objective 3: Participants will be able to relate to the skillset presented around change leadership, in a way, that plants a seed for development within self or others.

April Hershman is the director of organizational change management at Oshkosh Corporation. As a team member since 1998, she has witnessed the head and tailwinds of change. April is a Certified Change Management Professional (CCMP™), is Chair-Elect WI Leadership Board for American Cancer Society and holds a liberal studies degree.

Jenny Sabo is the Senior HR Manager at Pierce Manufacturing, an Oshkosh Corporation Company, with over 8 years of experience in Human Resources. She played an integral role in Oshkosh's recent change by being a liaison, planting the seeds and cultivating the change. Jenny holds an MBA with a supply chain emphasis.

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**Sex, Drugs & Rock n Roll- Welcome to the New Work Scene**

Michael Hyatt

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** Portia/Wisteria

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Human Resource Expertise

Thought that title might attract your attention. Sex, Drugs and Rock & Roll sums up many of the new HR conversations taking place today. HR professionals used to deal with substance abuse in limited situations and occasionally a harassment dispute. Today, the spotlight is focused on the opioid epidemic and the #MeToo movement. Now instead of being immediately terminated if tested positive for substance abuse, employers are working with employees to help them recover. With sexual harassment and zero tolerance policies, employees are terminated if an investigation confirms a harassment claim. The landscape is changing and organizations have to adapt.

Learning Objective 1: Discover the trending, and more difficult, HR discussions employers are having.

Learning Objective 2: Assess whether your organization has the positive environment needed to adapt to change.

Learning Objective 3: Assist leaders who resist change through 4 powerful steps.

Mike is a respectful leader, effective communicator, influential presenter and has proven experience collaborating with leaders at all levels. With a passion for coaching and training, Mike shares his wealth of knowledge with an energetic and creative approach helping individuals and organizations achieve results. Through powerful storytelling and sharing real-life experiences, he makes learning inspiring and effective.

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## **The New Emotional Intelligence for Leaders: Head Heart Gut Integration**

Cindy Zauner-Warner

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** C

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

Leaders who integrate their head and heart are scientifically proven to lead more successful, diverse and inclusive organizations. Plus, they have more fun! Learn how these authentic leaders integrate knowledge, intuition and empathy to inspire engagement, promote diversity, drive accountability, and make better decisions. Executive Leadership Coach and Organizational Development Consultant Cindy Warner shares the science behind head/heart/gut integration, as well as proven strategies for increasing your organization's ability to lead with higher inclusiveness and effectiveness in this fun, engaging session!

Learning Objective 1: Prove that leaders with higher head/heart/gut integration lead more successful companies and know the science behind effective head/heart/gut integration.

Learning Objective 2: Learn what your "default mode" is, and ways to integrate your personal knowledge, emotion and intuition for significantly improved relationships and results.

Learning Objective 3: Learn scientifically proven strategies to increase self-awareness and head/heart gut integration in leaders so they can "meet people where they are", resulting in higher engagement, retention and results.

Cindy Zauner-Warner is a Leadership and Organizational Development Consultant; Bradley Corporation, Adjunct Professor and Assessment Coach; St. Norbert College Center for Exceptional Leadership, Founder and President; Professional Executive Coaching, LLC. International Coach Federation ACC, Equine Assisted Executive Coach, BSBA UW-LaCrosse, MSHR Marquette University. Past member of SHRM, ATD.

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## Top 10 Value Drivers for Employee Ownership as a Business Succession Solution

Eric Strebe

Thursday, October 17, 2019

2:30 PM to 3:45 PM

**Room:** Guava/Tamarind

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Leadership and Navigation

This program will focus on the impact that employee ownership strategy can have on a business. Key topics explored will detail different uses for employee ownership including an engagement tool, a recruiting and retention strategy, a vehicle to enhance productivity and an additional retirement benefit. Eric will prepare you to articulate the benefits of employee ownership as it affects all employees within an organization.

Learning Objective 1: Learn how employee ownership aligns people strategy to business strategy.

Learning Objective 2: Explore how HR can use employee ownership to drive business results.

Learning Objective 3: Identify talking points that can be presented while speaking to your owner about employee ownership as a business succession strategy.

Eric has made a living teaching others. Whether it is in an academic setting regarding business finance, or a business setting addressing succession planning, changing lives by education is Eric's passion.

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## Addressing the 'Gender Pay Gap' In Total Rewards Strategies

Michael Maciekowich

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** F

**Track:** Total Rewards

**Level:** All Levels

**Competency:** Human Resource Expertise

Current research points to the fact that the "gender pay gap" has not closed and in fact maybe widening. Many organizations today are incorporating this fact into their total rewards strategies going forward. This presentation we review the current research on the gender pay gap, responses by numerous organizations and a review of total reward strategies to combat this issue.

Learning Objective 1: Understanding the history of the gender pay gap, it causes, and the outlook for the future.

Learning Objective 2: Understanding of "failed" total reward strategies, what they attempted to correct, and how they failed.

Learning Objective 3: Review of successful total reward strategies in combating gender pay gap issues and how they were successful as a guide for all for the future.

Michael F. Maciekowich is a National Director for Astron Solutions. His areas of expertise include the development, design, and implementation of executive, physician & employee base pay systems, short- & long-term incentive programs, sales incentive programs, and performance management systems in all industries. Michael has over 40 years of consulting and industry compensation experience. Prior to Astron, Michael worked for numerous consulting firms such as The Hay Group, Towers Watson, Adams, Nash & Haskell, and the Omni Group. Michael received bachelor's degrees in political science and philosophy from Loyola University of Chicago and a master's degree in industrial relations from the Quinlan School of Business of Loyola University of Chicago.

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## Care from Inside the Trenches: Establishing Peer Support Services

Michael McCafferty, PHR and Randy Kratz, LCSW, LPC

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** Portia/Wisteria

**Track:** Personal and Leadership Development

**Level:** Senior-Level

**Competency:** Communication, Human Resource Expertise, Relationship Management

Career responsibilities can sometimes carry an added weight of emotional, behavioral and physical demand that, if left unchecked, leads to unhealthy amounts of stress and eventual burnout. Peer support is an approach to workplace wellness that uses the non-clinical strengths and abilities of motivated, trained volunteer employees to enhance the resilience of their co-workers and organizations. By establishing a peer support program, Human Resources can strengthen internal resources and sustain the well-being of employees while providing an empathetic outlet for staff that promotes active listening and bolsters psychological wellness.

Learning Objective 1: Participants will explore the foundational principles of a successful peer support program.

Learning Objective 2: Participants will identify characteristics of a strong peer support representative, recognize how to select the best level of peer support for their organization and understand how to recruit and engage employees for the program.

Learning Objective 3: Participants will learn how peer support programs can operate with, and be augmented by, an employee assistance program (EAP).

With a diverse background in health care and human resources, Michael McCafferty is a skilled consultant who has a track record and personal commitment to helping organizations create the conditions for success. He provides consultation, training, counseling and EAP services to organizations of all sizes and industries.

Randy Kratz, a LCSW and licensed professional counselor in Wisconsin, has worked as both a counselor and a supervisor in outpatient and hospital settings for more than 15 years. He has been a workplace consultant for over 20 years, assisting organizations with substance abuse, stress, conflict management and organizational change.

# Wisconsin SHRM State Conference October 16-18, 2019

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## **Employee Benefits Strategies: What is in your Open Enrollment Took Kit?**

Sue Sieger, ACFEI, CAS

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** B

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Human Resource Expertise

In this session we will review year end compliance issues that should be on your radar and benefit strategies that will take you into 2020. What changes have occurred under President Trump and what changes might be on the horizon? How will the current ACA landscape impact your benefit strategies for 2020? We will review key compliance details that should be part of every open enrollment tool kit. Join us for our up-to-the-session details on how the current regulatory and legislative climate is impacting employee benefits now and a prediction of where we are going in 2020.

**Learning Objective 1:** Gain an understanding of the impact of Executive Orders under the Trump Administration has had on employee benefits.

**Learning Objective 2:** Gain an understanding of current legislative and regulatory updates on consumer directed health care now and in 2020.

**Learning Objective 3:** Gain an understanding of what compliance issues should be on your radar during open enrollment.

Sue Sieger has over 25 years of experience in the employee benefits industry. As senior compliance consultant at Employee Benefits Corporation, she has worked with thousands of employers and has become a leading specialist in employee benefits. Ms. Sieger is a frequent speaker on employee benefits both locally and nationwide.



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### **Fearless Coaching Conversations: Replacing the Review with Frequent Coaching Conversations**

Jeff Russell

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** D

**Track:** Personal and Leadership Development

**Level:** Mid-Level

**Competency:** Relationship Management

We need to move beyond the annual performance review and build a system of frequent collaborative coaching conversations throughout the year. But how do we create a truly meaningful coaching conversation that facilitates the employee's continuous improvement? This session introduces a model for conducting frequent fearless coaching conversations based upon a strong and collaborative employee/supervisor partnership. You'll learn how to structure fearless coaching conversations in ways that transform an often fear-inducing process into one that enables employee learning, growth, and performance improvement. Attend this session to discover how to build these coaching conversations into your performance management system.

Learning Objective 1: Describe the characteristics of a fearless coaching conversation and examine a framework for guiding these conversations.

Learning Objective 2: Discuss the Collaborative Mindset that enables a strong performance partnership and which facilitates the fearless coaching conversation.

Learning Objective 3: Explore strategies for building/integrating this fearless coaching conversation methodology into your existing performance management process.

Jeffrey Russell specializes in helping organizations respond to the challenges of continuous change. His business focus is on leading change, employee engagement, strategic thinking, leadership development, and performance coaching. Jeff is a frequent presenter at national and international conferences including past WISHRM State Conferences and the Jamaica Employer's Federation Conferences.

# Wisconsin SHRM State Conference

## October 16-18, 2019

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### **HR TALKS: Grief and Leadership; Seizing the Opportunity in the Digital Age; Life Hacks for Stress; Building Culture Competence with Higher EI**

Becky Tuma; Amber Laurent; Lisa Lanting; Cindy Warner

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** Guava/Tamarind

**Level:** All Levels

#### **Grief and Leadership: An Unexpected Connection of Lessons Learned**

**Track:** Personal and Leadership Development

**Competency:** Leadership and Navigation

The unexpected twists and turns of life can both throw employees and leaders off their game and provide an unforeseen foundation for growth. The death of a loved one is one of those events from which no one is immune. The grieving process, however, can occur following a multitude of life's events. What opportunities (or obligations?) do organizations and leaders have in not only "leaning in" to further engage employees during these experiences, but in creating an organizational culture that fosters collaboration, empathy and personal and professional development.

Learning Objective 1: Understanding of the grief process and similarities to change management models.

Learning Objective 2: Increased knowledge and awareness of leadership styles/people management techniques that best allow for growth and development opportunities during times of grief.

Learning Objective 3: Inspiration towards fostering an environment conducive to relationship-building during times of employee crisis/bereavement.

Becky joined Unity Hospice in 2016 as Employee & Organizational Development Specialist. Becky has 15 years professional HR experience in roles ranging from Learning & Development Manager to HR Director.

#### **Tomorrow's Talent is Here Today: Seizing the Opportunity in the Digital Age**

**Track:** Talent Acquisition and Retention

**Competency:** Leadership and Navigation

Given the pace of change in skills driven by advancements in technology, the future is much more about what employees can do than the specific jobs they've done in the past. We can't slow the pace of change, yet we can invest in skills to build the workforce of tomorrow and ensure we have the talent to win in the digital age.

Learning Objective 1: The state of Wisconsin's labor market today and tomorrow

Learning Objective 2: Technology's impact on jobs

Learning Objective 3: Strategies to recruit, attract and retain talent

Amber Laurent has worked for ManpowerGroup since 2000 and has years of experience in Wisconsin on the workforce. Amber is regularly featured in local media [[Journal Sentinel](#) and [BizTimes](#) are just a few] discussing national and local trends impacting the Wisconsin labor market and solutions to help employers and workers succeed.

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### **Life Hacks for Stress**

**Track:** Personal and Leadership Development

**Competency:** Relationship Management

Gain a new perspective on work/life balance and burnout. Using a fun, interactive, game format with anonymous polling via mobile device, this session offers fast, easy techniques to “hack” your body’s stress response in order to feel strong, calm, and resilient under pressure. We will explore research on chronic stress, which offers insights on how to work with our autonomic nervous system to prevent burnout.

Learning Objective 1: Identify stress triggers and their impacts on the body and mind.

Learning Objective 2: List four ways to quickly downregulate the nervous system and prevent burnout.

Learning Objective 3: Create a personal wellness action plan that includes at least one stress-management technique in daily life.

Lisa Lanting joins us from the Center for Health & Well-being at Madison College. She creates programs to help people manage stress and boost their energy, productivity, and quality of life. She is a National Board-Certified Health & Wellness Coach, Alignment Yoga and Meditation Teacher.

### **Building Cultural Competence with Higher Emotional Intelligence: Authentic Leadership**

**Track:** Personal and Leadership Development

**Competency:** Global and Cultural Effectiveness

In this session, you will learn how to build authentic and inclusive leaders via higher self-awareness. When leaders recognize and learn to use self-awareness information from their head, heart and gut, they dramatically increase their ability to meet others where they are and lead diverse, inclusive teams. These leaders access intuition and empathy to inspire, drive accountability, make better decisions.

Learning Objective 1: Know the science behind using "The 3 Brains of Head Heart and Gut."

Learning Objective 2: Learn to access all three brains to reveal higher intuition, wisdom and intelligence.

Learning Objective 3: Practice using all three brains to inspire, drive accountability, and make better decisions.

Cindy Warner is a global leadership development consultant and executive coach increasing leader’s emotional intelligence via experiential learning. BSBA UW-LaCrosse, MSHR Marquette University.

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### **Mega Session: Maintaining Wisconsin's Workforce Leadership: Tips and Tools to Build a Sustainable Talent Pipeline**

Rebecca Deschane, Lorissa Bañuelos, and Connie Loden

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** 1 and 8

**Track:** Talent Acquisition and Retention

**Level:** Senior-Level

**Competency:** Global and Cultural Effectiveness

With our record low unemployment rate and strong economy, we're finding jobs for everyone. However, our great Wisconsin companies still have a need for skilled employees to fill the jobs of today and tomorrow. That's why WDVA, WEDC, and DWD have joined forces to develop and implement a campaign aimed at attracting people outside our state to Wisconsin to pursue their professional and personal goals.

Our campaign specifically targets military personnel just beginning to plan their return to civilian life. Let us assist your company in being Veteran Ready to recruit, retain, and improve your successes with our nation's heroes.

Learning Objective 1: How to attract veterans, service members, and military spouses.

Learning Objective 1: How to change HR processes to ensure talent is being sought out and utilized; bringing your company success and decreased turn over.

Learning Objective 1: What exactly does it mean to be Veteran Ready and how to collaborate with state and private entities for total success.

Rebecca Deschane serves as the Talent Initiatives Director, a joint position with the Wisconsin Economic Development Corporation (WEDC) and the University of Wisconsin System, where she leads and coordinates both organizations' efforts to develop policies and initiatives designed to attract, develop and retain our state's future talent pipeline. In this role, she works to help align local, regional and statewide talent and workforce initiatives, engaging with businesses, communities and organizations to provide insight and policy development to support statewide talent needs.

Lorissa Bañuelos is the Director of Marketing & Investor Relations for New North, Inc. since August 2018. In her role she leads and oversees all marketing & investor relations initiatives including, but not limited to, the planning and deployment of events such as the New North Summit and the distribution and marketing of New North, Inc.'s branding tools. Lorissa works as the liaison for public relations, advertising, and creative content providers for the organization. Lorissa is a graduate of the University of Wisconsin, Green Bay, earning her BBA with an emphasis in both Marketing and Management.

Connie Loden currently serves as Senior Project Manager for the New North, an 18-county regional economic development organization in North Eastern Wisconsin. In her role at New North, Connie led the development of the highly successful Supply Chain Marketplace and its expansion statewide. She has over 20 years of experience in leadership and economic development roles, having received numerous state, national and international awards for her involvement in community economic development initiatives and rural development networks. She is an entrepreneur with a small business background, having started and operated several small businesses in Wisconsin.

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### **Navigating Musculoskeletal Healthcare: Improving Outcomes While Reducing Costs**

Jennifer Smith-Hulbert

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** E

**Track:** Total Rewards

**Level:** Executive Level

**Competency:** Human Resource Expertise

Musculoskeletal disorders are one of the largest health plan costs for employers. Effectively navigating the health care system at the time of need is the key factor in managing this issue. Physical Therapy as the entry point to care is the best kept secret in the conservative management of musculoskeletal disorders. This presentation teaches participants the positive impact of using physical therapy as a front-line provider for musculoskeletal issues. Participants learn how they can assist employees in efficiently navigating the health care system; resulting in optimal outcomes, improved healthcare access, increased employee productivity and decreased health plan costs.

Learning Objective 1: Recognize and identify how typical musculoskeletal healthcare utilization drives high health plan costs and limited patient outcomes.

Learning Objective 2: Understand how Physical Therapy can improve health care access, navigation and outcomes while reducing employer and employee cost alike.

Learning Objective 3: Learn how to redefine the way employees purchase musculoskeletal care through insurance plan design and employee engagement strategies.

Jennifer has been helping employers lower total health plan costs for over a decade. In her current role, she uses her experience with onsite clinics, wellness programs and insurance plan design to create innovative solutions focusing on musculoskeletal health.

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## Technology is Driving an Unstoppable Shift to On-Demand Pay

Dallas Wilfong

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** H

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Relationship Management

Static timelines for fixed paydays and rigid schedules for payouts are being challenged by a new payment solution that meets your employees' desire to receive disbursements NOW to any personal debit card, ANY paycard Brand, or other financial account.

- Advances in technology are driving an unstoppable shift to an on-demand culture in Financial Services
- This includes the delivery of corporate payments including wages, accounts payable, off cycle payments, adjustments, separation payments, accrued wage payments, and tips
- Businesses that don't adapt could find themselves behind the competition

Learning Objective 1: With a generational change in the workforce, the Millennial Generation have different needs/demands than the Baby Boomers. What are organizations doing and can do to stay competitive.

Learning Objective 2: The demand for more flexible and quicker pay is sweeping the Nation as the Millennial Generation and businesses adapt to the Next Generation of Payments to employees

Learning Objective 3: The "Gig-Economy" is expected to double and make up 40% of the work force by 2022. How corporations can prepare for the change and stay competitive.

Dallas Wilfong is the Director of Sales for the Eastern US at rapid! PayCard. In addition to his leadership and management role at rapid! PayCard, Dallas travels the United States to promote knowledge and education in the Paycard industry through supporting and speaking at numerous conferences, trade shows, and association meetings annually. Dallas has been with rapid! PayCard since 2012. Prior to joining rapid! PayCard, Dallas gained much of his experience working with the unbanked and underserved segment of the population while working in the Staffing Industry for over 10 years. In that industry he held many roles such as General Manager, Division Manager, and National Business Development Manager. Dallas is a graduate of West Virginia University and holds a degree in Business and Public Communications, Class of 1996.

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**The New Competitive Advantage: Creating the Employee Experience**

Daniel Stewart

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** C

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

Leading organizations are designing and managing the entire Employee Experience to positively impact business and people results. The Employee Experience is so much more than engagement or satisfaction surveys. In the fullest sense, it captures the critical ups and downs of an employee's journey with your organization - especially at the key moments that matter. As you strive to do with customers - do as well or better with employees. Ensuring exceptional employee experiences at critical points like during recruitment, first-day on the job, career development conversations, and supervisor interactions builds the needed employee commitment and strategic focus. Be mediocre at employee experience and watch your talent walk out the door - or worse, stay and not give you their best performance. Create exceptional experiences along the way and dramatically boost your organization's performance and sustainability.

Learning Objective 1: Identify what Employee Experience (EX) is, what it is NOT, and how it transcends employee engagement.

Learning Objective 2: Understand examples of how leading organizations are designing and managing successful employee experiences.

Learning Objective 3: Develop a plan for your organization to strengthen your employee experience to attract, develop, and retain the right talent.

Daniel J. Stewart is a sought-after talent management and leadership development consultant and coach with proven experience advising senior leaders, leading change, and designing leadership-rich organizations. He leads Stewart Leadership's extensive consulting practice, business development, and international partnerships.

Over the past twenty years, he has been an internal and external organizational development executive and consultant delivering talent and team development solutions, executive leadership coaching, group facilitation, change management, organizational design, and strategic planning for companies that include JetBlue Airways, Briggs & Stratton, Avaya Telecommunications, UW Milwaukee, Lockheed Martin, The Weihs Group (Venture Capital), Kohl's Department Stores, and Aurora Health Care.

# Wisconsin SHRM State Conference October 16-18, 2019

Kalahari Resort & Convention Center, Wisconsin Dells, WI

## Strategic Workforce Planning

Donald Herrmann

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** G

**Track:** Business Acumen and HR Strategy

**Level:** Senior-Level

**Competency:** Business Acumen

The current worker shortage has caused havoc for many businesses. Work is being turned away, and that is both stopping business growth and causing revenues to decrease. So, what is a business to do? The answer, not without concerted effort and skill, is simple. Workforce planning for your business can not only address the shortage but also make your company more productive and profitable. It is a strategic solution that solves your talent problems now and in the future.

Learning Objective 1: Understand how Strategic workforce planning can help your business drive improved performance, productivity, profitability, and shareholder value.

Learning Objective 2: Identify the 3 challenges of Strategic Workforce Planning.

1. Management must change its thinking about the workforce; from something to be minimized to the primary source of business success.
2. New measurements must help management lead the workforce to success.
3. Management must use data about the workforce as a means of strategy execution.

Learning Objective 3: Understand a simple 5-step process that will help you begin the Strategic Workforce Planning process in your place of work.

Don Herrmann, MBA, CPC, SHRM-SCP is founder and President of Herrmann Advantage Consulting, LLC in Appleton, Wisconsin. He has been a senior level HR executive for a number of companies in multiple industries with both domestic and global responsibilities. Don's industry experience includes distribution, logistics, retail, financial services, construction, technology, healthcare, manufacturing, aerospace, and defense.



**Wisconsin SHRM State Conference**  
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**Strengths First Leadership Experience**

Scott Gostchock

Thursday, October 17, 2019

4:00 PM to 5:15 PM

**Room:** A

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Leadership and Navigation

Strengths-based leadership and team development are vital for every individual and group. The Strengths First program focuses on individual strengths, the need to partner with others, and how it all fits together to optimize all people and situations. Through discussion and direct application of CliftonStrengths and our own proprietary tools, individuals and teams will see themselves in a new and positive light to be more engaged in all facets of one's life.

Learning Objective 1: Understand the uniqueness of each person's individual strengths

Learning Objective 2: Recognize and appreciate personal strengths, as well as the natural need for others' strengths achieved through partnering-up

Learning Objective 3: Identity how it all fits together, using strengths for individuals, teams and organizations to increase engagement, energy and efficiency

Dr. Scott Gostchock has served educational, corporate, and community groups, providing training and leadership development to a diverse population around the globe. His insights gained from years of individual and team-building coaching, group presentations, and transformational leadership are shared in ways that inspire, motivate, and create action.

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**Effective Financial Management of Worker's Compensation Costs**

Jon Templin and Jeff Frey

Friday, October 18, 2019

6:30 AM to 7:30 AM

**Room:** G

**Track:** Business Acumen and HR Strategy

**Level:** Mid-Level

**Competency:** Communication

This presentation will cover the methods a company can utilize to help control the cost of Worker's Compensation. We will go through the factors that determine your experience modifier and will use real-life examples to demonstrate the impact of claims reserves, lost time, and medical only claims on your long-term Worker's Compensation costs. We will also share strategies to help you minimize the effects of each worker's compensation claim through proactive management, including light duty and return-to-work policies.

Learning Objective 1: Understand how an experience mod is calculated and controllable factors

Learning Objective 2: Understand the multi-year impact of claims on experience modifiers and Worker's Compensation premiums

Learning Objective 3: Develop strategies and procedures to minimize long-term financial impact of Worker's Compensation claims

Jon enjoys making clients of Hausmann-Johnson Insurance aware of the risks that they face and teaches them how to address those risks so that their businesses can continue to thrive. Jon is extremely detail-oriented when it comes to reading contracts and coverage forms and is very effective at making clients aware of unfavorable contract language in leases and construction agreements.

Jeff has been with Hausmann-Johnson Insurance since 2013 and became an owner in 2016. He specializes in large and unique insurance programs, primarily focusing on the construction, agriculture, and manufacturing industries. Jeff prides himself on not only providing businesses with insurance, but also educating them about it to become a true risk management partner.

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## Management Training to Improve Your FMLA Compliance

Darlene Clabault

Friday, October 18, 2019

6:30 AM to 7:30 AM

**Room:** F

**Track:** Employment Law and Legislation

**Level:** Mid-Level

**Competency:** Human Resource Expertise

No one ever said dealing with leave under the Family and Medical Leave Act (FMLA) was easy. One of the challenges employers face is learning of an employee's absence days or weeks after the employee first takes leave. True, managers are often the weak link in your FMLA compliance chain. This is where manager training can not only help shore up your compliance, but also save you time and effort. Imagine no longer racing to meet FMLA notice deadlines or fear reprisal because a deadline is missed. Managers can't help if they don't know how!

Learning Objective 1: Understand what managers need to know to help with FMLA compliance.

Learning Objective 2: Be able to approach managers in a way that they want to help.

Learning Objective 3: Hear what courts have said regarding manager compliance involvement.

Darlene Clabault has been an editor at J. J. Keller & Associates since 1996, researching and creating content on HR topics such as the FMLA, ADA, and I-9 compliance, and is responsible for related publications. In addition to writing about such laws, Darlene has presented at various state SHRM conferences.

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Open

Friday, October 18, 2019

6:30 AM to 7:30 AM

**Room:** Guava/Tamarind

**Track:** Total Rewards

**Level:** All levels

**Competency:** Communication

# Wisconsin SHRM State Conference October 16-18, 2019

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## **Toxic Employees Are Ruining Our Respectful Workplaces: How to Investigate and Eradicate Bullying Behavior**

Lisa Bergersen, SHRM-SP, SPHR

Friday, October 18, 2019

6:30 AM to 7:30 AM

**Room:** Portia/Wisteria

**Track:** Employment Law and Legislation

**Level:** Mid-Level

**Competency:** Human Resource Expertise

Employers put forth great effort to build and maintain a respectful workplace. The first initiative is to observe the various EEO laws that serve to safeguard employees from harassment and discrimination based on their protected class status.

But what about the employee or manager who bullies co-workers not because of their protected class status, but because the offender is a toxic employee? What rights do employers have relative to these employees? What obligations do employers have to the victims of their behavior? One thing is for certain, any efforts at establishing a respectful workplace or work team will quickly crumble if the bully is left unchecked. And sometimes the behavior is so subtle, the perpetrator so charismatic, and/or is such a stellar performer, that employers don't recognize them for what they are, or may overlook their toxic tendencies, without realizing the damage they are in fact generating.

Learning Objective 1: How to identify and label bullying behavior and to understand the differences between bullying and unlawful harassment.

Learning Objective 2: Investigative and interview techniques designed specifically to effectively probe and detect bullying behavior, and how to eradicate it using remedial plans or elimination.

Lisa Bergersen is the founder of EngageHR Law, an employment law and HR consulting firm. Lisa practiced employment law for 18 years and has developed numerous programs for clients, human resources professionals and employer groups and associations. Lisa also has 10 years of experience leading a human resources department where she built the HR function from the ground up. Lisa is a licensed attorney, and holds SHRM-SP and SPHR certifications, she was a 20-year contributor to the Wisconsin State Bar Employment Law book series, she is a member of Metro Milwaukee SHRM, the Association of Workplace Investigators and the Local Government and Labor & Employment Law Sections of the Wisconsin Bar Association.

# Wisconsin SHRM State Conference October 16-18, 2019

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## Active Shooter Preparedness/Leading Through Crisis

Aubree Martin, PHR, SHRM-CP, and Cindy Holmes

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** G

**Track:** Personal and Leadership Development

**Level:** Mid-Level

**Competency:** Leadership and Navigation

The Dane County Preparedness for Active Shooter and Violence team brings their condensed training focused on being prepared and see something, say something. Aubree Martin, Paradigm, shares her lessons learned and an HR leader perspective after navigating an organization through an active shooter on 9/19/2018 in Middleton, WI.

Learning Objective 1: Being prepared in the event of workplace violence.

Learning Objective 2: Communicating and training your employees.

Learning Objective 3: Leading through crisis. How do you do it when you are a victim yourself.

Aubree Martin is an HR leader with over 18 years of progressive experience focused in professional services.

Deputy Cindy Holmes Graduated from Univ of Oklahoma in 1985 with a BA in Social Work. Cindy worked for the Oklahoma Department of Corrections as a prison unit Case Manager and high-risk Probation/Parole agent from 1985-1989. She worked for Wisconsin State Capital Police Department from 1990-1991 and was hired by the Dane County Sheriff's Office in 1991. Cindy served as a Community Deputy, Grenadier for Special Events Team and Taser/Less Lethal Instructor. In 2015 she received the DCSO Medal of Valor award and the meritorious service award from the WPPA. Cindy retired in January 2017, returning to DCSO in April 2017 as the Dane County Emergency Preparedness Assistant Coordinator. She is a certified Instructor for Stop the Bleed, ALERRT Civilian Response to Active Shooter Events and ALICE active shooter training.

# Wisconsin SHRM State Conference October 16-18, 2019

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## **Bridging the Distance: Strategies to Improve Global Virtual Team Performance**

Lee Johnsen, SPHR, CPLP, CPT

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** H

**Track:** Global HR

**Level:** Senior-Level

**Competency:** Global and Cultural Effectiveness

By 2020, it is estimated that 62% of employees are expected to work in virtual teams, making them possibly the single most important way that companies prioritize and coordinate work. Based on a worldwide research study, leading cross-cultural teams is in the top 10 global leadership development competencies needed today.

Navigating the complexities of global business exceeds those of familiar domestic practices. Yet, the practices of leading onsite teams fall short of the leadership required for dispersed teams, both domestically and internationally. How prepared are your leaders to meet the challenges of leading in a global marketplace. How prepared are you to help them? We can do better.

As a result of this session, participants will be able to:

Learning Objective 1: Identify research-based challenges faced by global virtual teams and ways to boost their performance.

Learning Objective 2: Consider Eight Critical Success Components and their impact on virtual teams.

Learning Objective 3: Explore ways to make global virtual teams more inclusive

Lee S. Johnsen, CPT, CPLP, SPHR is a respected leader, author and international facilitator in the fields of virtual team management, leadership development and performance improvement. With a background in both business and counseling, Lee brings his unique expertise to coaching and consulting with executives and leaders. He is an expert at helping global teams and their leaders navigate the challenges and opportunities of working in a virtual world. He is author of the book, *Literally Virtually: Making Virtual Teams Work* (2019)

# Wisconsin SHRM State Conference October 16-18, 2019

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## **Corporate Culture: Incorporating Talent Attraction & Retention from the Inside Out**

Todd Kuckkahn

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** C

**Track:** Talent Acquisition and Retention

**Level:** All Levels

**Competency:** Relationship Management

With the population demographics across the country, the challenges of attracting and retaining talent is exacerbated with leadership challenges on the inside and the appropriate corporate culture to attract and retain talent. It is a change process through self-, pre-, on-, in- and re-engagement of employees. Recruiting talent is never ending, beginning before the job announcement and continues through the exiting the organization. Exposure to a growth-oriented culture is key to success. An organization and the individuals within the organization, need to look inside themselves to solve the talent attraction and retention puzzle. How your organization and the people inside it communicate, grow, lead, and prioritize engages people to come to your organization and determine how long they stay. You will leave the session with actionable adjustment you and your organization can make immediately and ways to continue to build after the conference.

Learning Objective 1: Participants will learn the five stages of the talent attraction and retention process.

Learning Objective 2: Participants will learn actionable items for each of the five stages of the talent attraction and retention process to positively impact the corporate culture.

As executive director of the Portage County Business Council, Todd works with the community and members in the areas of talent attraction and retention. As a John Maxwell Team independent certified speaker, coach, teacher and DISC training, Todd has done several presentations related to human resources issues. Todd is also a member of the Stevens Point Area Human Resources Association.



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## **Diversity Advocate Award Winner: Planting the Seeds in Inclusion**

Patrick Yates and Kathy Cefalu, SPHR, CCP, GRP, SHRM-SCP

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** Guava/Tamarind

**Track:** Personal and Leadership Development

**Level:** All Levels

**Competency:** Global and Cultural Effectiveness

In this session the attendee will gain information on the growth of TDS Telecom's diversity and inclusion efforts. Information will be shared on TDS Telecom's business, its practices, and evolution to a broadband company. Background information will be communicated on the presenter's and their involvement regarding establishment of TDS Telecom's diversity initiatives. Participants can expect to learn about the company's desire for diversity, their vision, insight into their established Employee Resource Groups, and what they foresee as next in their evolution of moving their diversity efforts forward.

Learning Objective 1: You will never grow anything unless you plant

Learning Objective 2: You have to know your soil

Learning Objective 3: Diversity is a journey

Kathy Cefalu - SPHR, CCP, GRP, SHRM-SCP, is the Chief Human Resources Officer for TDS Telecom. She holds a bachelor's degree in Business Administration from UW-Platteville and a MBA from Edgewood College. Kathy oversees employee relations, diversity and inclusion, safety, compensation, benefits, employee recognition and talent acquisition and development in support of 2,800 employees in 36 states.

Patrick Yates is a 26-year employee with TDS Telecom, and currently the Manager of Diversity and Inclusion. Mr. Yates supported TDS being named to Forbes magazine list of America's Best Employers for Diversity in 2018 and 2019. Patrick graduated from Herzing University and was their 2017 "Wall of Fame" award recipient.

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## Interviewing for Success: Keeping it Legal and Informative

Justin Rueb, SPHR, SCP, HRPM

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** E

**Track:** Employment Law and Legislation

**Level:** All Levels

**Competency:** Human Resource Expertise

Given the interview is the singularly most popular selection measure used today, yet often lacks in validity, this session will look at the how's and why's of successful interviewing. Attendees will learn the importance of a job analysis, the purpose of the interview, and how to develop an interview using appropriate questions and processes that would be in compliance with federal and state laws. An interactive presentation will allow for attendees to understand what questions are appropriate. Furthermore, the validity of various types of interviews will be discussed.

Learning Objective 1: Attendees will learn of the legal basis for a job analysis and how it applies to the interview.

Learning Objective 2: Attendees will understand on to develop strong legal questions that are supported by the job analysis.

Learning Objective 3: Attendees will understand what the best interview structures and processes are to achieve maximum validity from their interview.

Dr Justin Rueb is President of Aspiring Heights, a professor at the UW-Stevens Point, and retired as an Air Force Lieutenant Colonel. He conducts research in motivation, human resources, leadership, and sexual harassment, with over 100 articles/presentations at the Academy of Management, Society of Industrial/Organizational Psychologists, and various SHRM conferences.

# Wisconsin SHRM State Conference

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### **Partial Self-Funding, Level Funding and Reference Based Pricing: Are they Right for Your Firm?**

Dean M. Hoffman

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** D

**Track:** Total Rewards

**Level:** All Levels

**Competency:** Consultation

This session is geared towards business owners and human resource benefit managers who are either new or seasoned in the concept of self-funding group health plans. This session begins with the basics of self-funding a health and welfare plan and progresses to more advanced topics. Mr. Hoffman breaks down Third Party Administrative (TPA), Administrative Services Only (ASO) and Level funding models into easy-to-understand segments and explains the plug and play approach to claims administration; stop loss, disease management, pharmacy plans and direct provider contracting, and high cost carve out features. He also provides a review of stop loss "contract type" including run in, run out, incurred and terminal liability. Self-funding group health plans is not a new concept for larger employers; however, many small and mid-sized employers are seeking this funding method as result of healthcare reform and the Affordable Care Act.

Learning Objective 1: Consider the pros and cons of a self-funded plan. Learn the differences between TPA, ASO and Level funded models. Understand the stop loss function and contract variations with a deep dive into stop loss contract variations.

Learning Objective 2: Learn what the liability issues are and how they work with the employer's financial goals. Review the surge in small group self-funding products and their specialty stop loss contracts.

Learning Objective 3: Consider the cash flow requirements of implications of a self-funded group health plan.

Dean M. Hoffman, Owner of an employee benefit consulting firm, Dean M. Hoffman, LLC provides customized training for employers, plan sponsors, benefit managers, chief financial officers, employee benefit consultants, project consulting and expert witness testimony work. He has been in the employee benefit industry for more than 40 years with an emphasis on self-funded health plans. Mr. Hoffman has expertise in a broad range of employee benefits including prescription plan analysis and all funding arrangements including conventionally insured, minimum premium, stop loss, level funded, reference based pricing and self-funding. His consulting process will utilize his technical skills, advanced knowledge of ERISA plans, stop loss contracting and data analytics to meet the needs of the Plan Sponsor and employees. Mr. Hoffman's knowledge on self-funded arrangements has made him a favorite at many employee benefit and health care conferences around the country.

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## **Robots Won't Take Your Job, But They Will Change It**

Julia Sweeney

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** B

**Track:** Business Acumen and HR Strategy

**Level:** Mid-level

**Competency:** Business Acumen, Global and Cultural Effectiveness, Human Resource Expertise

Anxiety levels run high in discussions concerning the alarming, potential impacts the future of Artificial Intelligence may bring. How many jobs will be taken away? How many livelihoods today will be replaced by a machine that can do the tasks at a higher rate of production, with wider profit margins, and a quicker response to shifting business strategies? The concern is understandable “a natural fear of the unknown” but misguided. There is real change coming in the workplace, a kind and extent rarely seen before in history.

A confluence of trends, three in particular, are going to demand fast adaptation from many organizations around the world. The way through is to embrace the change, not hide from it. The race will be won by the most flexible. Attend this session to learn about these changes and trends so you can consider how they may be best applied to your organization.

Learning Objective 1: Examine three trends that are going to demand fast adaptation from many organizations around the world.

Learning Objective 2: Review how companies are applying artificial intelligence in their organizations.

Learning Objective 3: Learn four key strategies to embrace change and prepare workers and organizations for what's next.

Julia Sweeney advises clients on matters of talent strategy. With 25 years of experience, she has effectively and enthusiastically driven progress and results through internal leadership roles and consulting. She shares an astute perspective on talent strategy, succession planning, culture transformation, leadership development, executive coaching, and diversity and inclusion.

# Wisconsin SHRM State Conference

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### **The Art of Listening to the Voice of the Employee**

Yutaka Takagi

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** A

**Track:** HR Technology

**Level:** Mid-Level

**Competency:** Communication, Leadership and Navigation, Relationship Management

How a company treats its employees matters more to people today than the company's mission or core values. And yet, nearly half of the U.S. working population feel they're not being treated fairly at work. The traditional engagement survey "often viewed as the way to assess how employees feel at work" is no longer adequate to capture the true Voice of the Employee (VoE). Thanks to advances in natural language processing technologies, organizations can get a deep understanding of how their people are really feeling, which is the first step in creating a great experience for their employees at work.

Learning Objective 1: The art and science of keeping the pulse on your teams, individually and as a whole

Learning Objective 2: Key considerations for capturing the true Voice of the Employee (VoE) - limitations of traditional engagement surveys

Learning Objective 3: Applying new technologies to understand, predict, prescribe, and act on your employee data

Yutaka Takagi has spent his career demonstrating the value of HCM solutions to business leaders across the country and across industries. Having worked on both sides of the customer-vendor relationship in various roles, he brings a unique perspective to all of his thought-provoking presentations.

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### **The Future of Work: Preparing for the Tsunami**

Jon Kaupla

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** Portia/Wisteria

**Track:** Business Acumen and HR Strategy

**Level:** All Levels

**Competency:** Business Acumen, Consultation, Human Resource Expertise

We are living through a transformation in the way we work. We're experiencing changes to the composition of the workforce: increased automation that is replacing human tasks and jobs, more retirees returning to work (or simply staying on part time), employees seeking work/life balance and greater flexibility/autonomy, and the increased influence of the "1099 economy." This talk will provide some proactive ideas for you to prepare for this significant change.

Learning Objective 1: Discover how the impact of the talent and skills shortage, and the rising life expectancy, will impact individual organizations and the entire U.S. market by 2030.

Learning Objective 2: Learn how to create an "agile talent ecosystem" including the key talent strategies within the ecosystem.

Learning Objective 3: Develop short/long-term talent sourcing and retention ideas that address the talent and skills shortage in organizations.

Jon is executive director of the Center for Professional and Executive Development at the University of Wisconsin-Madison where he oversees the development and delivery of non-degree educational experiences for over 5,600 working leaders/professionals annually. He has over 20 years of HR leadership experience with a variety of organizations.

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## **Straighten the Winding Road of Sales Compensation**

Matt Shefchik

Friday, October 18, 2019

10:00 AM to 11:15 AM

**Room:** F

**Track:** Total Rewards

**Level:** Senior Level

**Competency:** Business Acumen, Human Resource Expertise

Affecting change in your sales compensation plans is a road many HR and Finance departments are not interested or willing to take. Yet clear, concise, aligned sales compensation plans are a fantastic tool to drive organizational results. Take a straight journey to work through the steps of a sales compensation redesign and some of the speed bumps you may encounter along the way.

Learning Objective 1: Understand the core building blocks and steps of an effective sales strategy and compensation plan.

Learning Objective 2: Discuss the role and multi-faceted team needed to address sales compensation redesign and administration.

Learning Objective 3: Identify critical bumps in the road that might derail the process and how to address them.

Matt has been involved in compensation and human resources management consulting engagements for over 15 years. Specific areas of concentration focus on employee and executive compensation, sales and incentive compensation, job evaluation, succession planning, and employee engagement surveys. His experience in consulting includes technology, health care, manufacturing, not-for-profit, and banking industries.