Updated 9/5/14

Stepping Up For Change: Creating a Culture of Ownership
John Izzo
Thursday, October 16, 2014
8:15 am-9:45 am

HRCI Credits: Business
Track: Accountability
Level: Intermediate

The Stepping Up for Change session is aimed at getting participants to take greater ownership, bring more innovative ideas, become stronger change agents, take more personal initiative for solving problems, challenge themselves to grow, and to create a climate of ownership around them.

Through exploring the dynamics of personal responsibility, taking initiative, risk taking and clarity of vision, participants will learn:

- Why taking responsibility matters- how our lives, careers, relationships, organizations, and communities can be radically better if we look to ourselves to change things rather than looking for others to do it
- How to do what we can do, where we are, in our own sphere of power
- Explore what it means to be and act like an "owner" in various realms both in personal and work life
- Learn the keys to creating a culture of ownership:
    - Giving People A Seat at the Table
    - Giving Responsibility to Foster Responsibility
    - Learning how to encourage ideas and innovation along with divergent thinking
    - Develop a "tight-loose" style where outcomes and goals are clear while giving lots of leeway for the "how"
- The Keys to stepping up and having more influence include:
    - Naïveté and Optimism
    - Flexible mindset about your own skills and capabilities
    - We are all Leaders- Leadership is a posture and choice
    - Influence is at the heart of Leadership
    - The 100% Responsibility/0% Excuses model
    - Exercising True Grit when the times get tough
    - Cultivating an Initiator vs. Victim approach to challenging situations
    - Leveraging the 'responsibility ripple'
    - Speaking up-How to Be a Constructive Irritant
    - Ensuring all key players have a seat at the table

Dr. John Izzo helps companies maximize their potential from the ground up. For over 20 years, Izzo has worked with thousands of leaders around the world, on employee-engagement strategies and brand transformations. Now, he shares the secrets to how purposeful leadership translates into sustainable success, with audiences everywhere.

Dr. Izzo is the former senior organizational-development consultant for Kaiser Permanente, and former Vice President of The Einstein Consulting Group, an international customer-service consultancy. He advises some of the world's most admired companies, teaches at major universities, conducts leading-edge research on workplace values, and has spoken to more than one million people around the globe. He has served on the boards of several large conservation organizations, worked with over 100 companies to create more socially responsible workplaces, and was chair of the North American Environmental Caucus at the UN Conference on Development and Sustainability in Cairo.

Frequently profiled in the media, Dr. Izzo has appeared on CNN and *Canada AM*, and in the *National Post, The Globe and Mail, The Wall Street Journal,* and *Fast Company* magazine.

A bestselling author, Dr. Izzo has five books, including *Awakening Corporate Soul*; *Values Shift: Recruiting, Retaining and Engaging the Multigenerational Workforce*; *The Five Secrets You Must Discover Before You Die*; and *Stepping Up: How Taking Responsibility Changes Everything.*

Shed or You're Dead: How to Stay Alive & Thrive in the Midst of Change
Kathy Dempsey

Friday, October 17, 2014
12:15 pm-1:30 pm

HRCI Credits: Business
Track: Strategic
Level: Intermediate

Millions of dollars and thousands of hours are lost each year due to the inability to get your employees to move forward with change. Why do 75% of all change efforts fail? Managing smart in turbulent times and leveraging your human capital effectively are two of the most critical skills for HR leaders today.

Kathy B. Dempsey, award winning author, keynote speaker and change expert is President of Keep Shedding! Inc. Kathy ignites people and organizations with the skills and motivation to lead and manage change. Her most popular book, Shed or You're Dead®: 31 Unconventional Strategies for Growth and Change has been awarded with a Writer's Digest International Book Award. Her Survival Guide books; A Fast Acting Change RX for Every Employee and Manager & Healthcare Professional has been utilized as a guide for change by 100s of individuals and organizations. Kathy is a contributing author for two of the NY Times Best Selling Chicken Soup for the Soul books. She is also the editor of 60 Seconds of Shedding. A monthly e-newsletter read by over 14,000 people around the world.
She has achieved the highest earned speaker's designation in the world, the Certified Speaking Professional (CSP) and has twice been designated a Top 5 Speaker for the year. A native of Washington, DC, Kathy now resides in Scottsdale, AZ with her business partner, Lenny the Lizard, the Chief Energy Officer (CEO) of KeepShedding! Inc. Together, Kathy and Lenny ignite professionals with the practical skills to lead and master change.

The Annual Legal Overview: Keeping up with the Times
Bob Gregg, JD: Jennifer Mirus, JD and Steve Zach, JD: Boardman & Clark LLP
Wednesday, October 15, 2014
1:00 pm-4:30 pm

HRCI Credits: General
Track: Strategic
Level: Basic

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 key on three areas:

Legal Update

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

Disability Law Update
Successfully addressing disabilities in the workplace requires knowledge of the law and a thoughtful approach. This presentation will focus on the latest in the area of disability discrimination, requirements to accommodate disabled employees and how disability laws intersect with other key laws such as the FMLA. The practical discussion of recent cases will inform you as to the "do's" and "do nots" in the arena of disabilities in the workplace.

Electronic and Social Media Issues
As technology tools and use in the workplace change and expand at a rapid rate, employers are faced with an increasingly complex mix of employment issues. In addition, the laws impacting those issues are changing at an equally rapid pace. This segment of the program will explore that latest status of the laws regarding electronic and social media, including on- and off-duty use of electronic communication and social media, employee privacy, employer security, and individual rights of

expression and concerted activity versus employer ability to control the workplace.

Bob Gregg, a partner and Chair of the Labor & 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 EEOC discrimination claims, wage and hour suits, FMLA, NLRA, equal pay, contract and Unemployment Compensation cases. Bob is nationally recognized for his work on harassment, bullying and respectful workplace issues. He has designed the employment handbooks and effective workplace policies and procedures for numerous private and public employers. Bob has conducted over 3,000 supervisory training programs throughout the United States. He is a member of the National Speakers Association, SHRM, a national faculty member of the American Association for Affirmative Action Certification Institute, and serves on the Board of Directors of the Department of Defense Equal Opportunity Management Institute Foundation.

Jennifer S. Mirus is a partner in 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 a 1993 honors graduate of the University of Wisconsin Law School. She is a sought out speaker for human resources groups, she teaches employment law courses at the University of Wisconsin-Madison Small Business Development Center, and is an alumna of Leadership Greater Madison.

Steve Zach is a partner with Boardman & Clark LLP in Madison, Wisconsin. Steve concentrates his practice in the labor and employment field and in employment-related litigation. He advises private and municipal employers in areas of general employment law, including issues involving wage and hour, Family Medical Leave, and disability laws. Steve advises businesses and municipalities in their relations with labor unions under the National Labor Relations Act, the Wisconsin Municipal Employment Relations Act and the Wisconsin Fair Employment Act, including the counseling of employers during representation proceedings, the negotiation of labor agreements, the arbitration of labor disputes and the litigating of unfair labor practice charges. He litigates discrimination claims before municipal, state and federal administrative agencies and in federal and state courts. Steve provides training and guidance to employers and supervisors on employment-related topics. Steve is a graduate of the University of Wisconsin Law School, cum laude, and St. Norbert College.

Lean HR
Dwane Lay, Dovetail Software
Wednesday, October 15, 2014
1:00 pm-4:30 pm

HRCI Credits: Business
Track: Strategic
Level: Intermediate

Lean principles have been used for years in the manufacturing world, and have started to make an impact in the office as well. These tools can provide the foundation to building a systematic approach to improving your HR practice and lowering costs. In this session, we will review a sample structure for project generation, selection and governance. Additionally, we will apply these tools in an interactive session to create a list of potential actions attendees can use on their return to their organization. The intent is to provide a high level overview of the methodology, provide tools that can be taken and implemented, and provide experience applying the tools within the session.

Learning Objective #1:

Understand how the application of Lean principles can improve an HR function.

Learning Objective #2:
Review a selection of Lean tools to address idea generation and evaluation.

Learning Objective #3:
Discuss a structured approach to selecting and managing an HR project portfolio.

Dwane Lay is author of the book Lean HR: Introducing Process Excellence to Your Practice. He has spent over a decade as an HR practitioner, following an early career in operations, IT and quality. This background has given him a unique perspective on the processes that make up human resources, and the potential for improvements in efficiency and effectiveness. He is recognized as a leading authority on the application of Lean tools and techniques in Human Resources, as well as having a wealth of experience in applying business technology to improve HR processes. A well-known presence on the HR social media landscape, he can be found on a variety of platforms, including Twitter (@DwaneLay), Facebook (facebook.com/dwanelay) and LinkedIn (linkedin.com/in/dwanelay). He also writes on human resources, process design and, occasionally, comic books and moves at www.LeanHRBlog.com Dwane holds an MBA from Lindenwood University, as well as having earned a Six Sigma Black Belt and is a certified Senior Professional of Human Resources with HCRI. He also serves as the Head of HR Process Design for Dovetail Software, a leading provider of HR case management solutions.

Aligning Talent Strategy with your Company's Strategic Plan
Sharon Hulce, Employment Resource Group Inc.

Thursday, October 16, 2014
3:30 pm-4:45 pm

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: Business
Track: Strategic
Level: Intermediate

This session is designed to align the HR function of talent management to the senior leadership's role and implementation of strategic planning. How do you make sure you have the right talent in the right seats and get ahead of the hiring curve based on your company's must do-can't fail goals? What about home grown talent – who once worked beautifully, today has limited competencies as your firm continues to grow and innovate. How do you handle this challenge without throwing "the baby out with the bath water?" We will unpeel the onion on a talent management strategy. This session will give you a look into the step by step process. We'll analyze how to develop an active recruitment plan from strategy, how to track key performance indicators with the current employees, how to establish metrics for retention for high performers and putting together a strong succession plan for knowledge transfer.

Learning Objective #1:
How to put together a talent strategy from the baseline of your Company's Strategic plan.

Learning Objective #2:
How to track and retain high performing employees.

Learning Objective #3:
How to garner support for talent management from people of influence within your firm.

Sharon Hulce is the President/CEO of Employment Resource Group Inc. She has twenty years of experience in Executive Search. Sharon's approach to talent is the following, "A business and community's most valuable asset is the people within. Helping others to define their purpose, attain goals and become integrated into an organization has become our mission at ERG. We are proud of the emotional intelligence we have been able to share with our for profit and not-for profit clients". Sharon is an author of a new book, "A Well-Done Professional Mid-Life Crisis". This book was written to assist executives and team members to not only find their true vocation but to bring joy, balance and passion back into their hectic work lives.

Clear, Concise, Confident Communication
Tracy Butz,
Think Impact Solutions
Thursday, October 16, 2014
1:15 pm-2:30 pm

HRCI Credits: General
Track: Accountability
Level: Basic

The ability to effectively organize our ideas and communicate them clearly and concisely is a core skill. Whether we need to illustrate our point one-on-one, in a small group, over the telephone, via email or present a concept to a larger group, we all realize that how we communicate our message can dramatically affect the outcome. Discover how to quickly structure your ideas and communicate them in a logical manner, be more persuasive and impactful in challenging situations, answer questions effectively and with greater confidence, and also maintain poise under pressure when it matters most.

Learning Objective #1
Structure your thoughts into a simple, yet effective format, allowing you to better articulate your message clearly and concisely, while also adding depth and greater understanding for the listener(s).

Learning Objective #2
Create logical points to communicate your message successfully, whether one-on-one, over the telephone, through e-mail, in meetings, and with informal or formal presentations.

Learning Objective #3
Be more persuasive and impactful when communicating, presenting or speaking, while also demonstrating greater poise and enhanced self-confidence.

Tracy Butz, owner of Think Impact Solutions, is an inspirational speaker, captivating author and successful entrepreneur. She is best known for engaging individuals and organizations, empowering them with innovative concepts and tools to become architect of their own lives. Tracy has 18 years of experience actively engaging both large- and small-size audiences, from a wide range of industries, including the US Army, Kimberly Clark, Plexus, 4imprint, Women's Leadership Network, and Subway Restaurants, just to name a few. She is skilled in the areas of leadership development, candid conversations, embracing change, employee engagement, and interpersonal communication. Tracy delivers the tools for today's world, propelling her audiences to live more productive, passionate and purposeful lives.

Corporate Restructuring: The Impact of Organizational Structure and Design on the Bottom Line, MRA
Patrice Hoeschele, MRA- The Management Association
Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: Business
Track: Strategic
Level: Advanced

Organization restructuring can be one of the great assets or dramatic deficits to a company. The bottom line effect is significant. A re-structuring process is a change management catalyst. Understanding the impact of re-structuring will provide for greater strategic dialog with key management and will provide deeper thinking on mitigating risk. This is a prime example of demonstrating HR's capacity to influence bottom line management and strategic thinking.

Learning Objective #1
How organizational structure impacts the bottom line.

Learning Objective #2
Assess structure and determine immediate and long-range effectiveness.

Learning Objective #3
How to initiate structure and re-design strategy/tactics.

Described by colleagues as optimistic, driven and enthusiastic, Patrice is a multi-disciplined, experienced professional. Her leadership style and passion focus on coaching individuals and teams, challenging others towards creative, continuous improvement. She models the philosophy of John F. Kennedy, "Leadership and learning are indispensable to each other."

Certified as a CQA (Certified Quality Auditor) and SPHR (Senior Professional in Human Resources), Patrice breaks down complex processes into streamlined, intuitive, cross functional systems across a variety of industries. She consistently demonstrates thoughtful and creative solutions to challenges, developing credible rapport throughout organizations.

Patrice holds a B.S. degree in Business Administration from Cardinal Stritch University, Milwaukee, WI, with continued education at Marquette University and the Milwaukee School of Engineering.

Could Violence Happen at Your Workplace?
Leslie Ptak, US DOL-OSHA

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Accountability
Level: Intermediate

Do you handle money or controlled substances at your worksite? Does your staff lay-off, fire or discipline workers? Any of your workers have domestic issues that may carry into the workplace? Is your client or patient in an altered state of mind? OSHA recently published enforcement guidelines for Violence in the Workplace. Work related homicides, violent assaults and suicides are the NUMBER 2 cause of fatalities in the workplace!!! This session will explore the four types or sources of workplace violence and discussion OSHA's expectations and prevention measures.

Learning Objective #1:
Learn the OSHA regulations that govern Workplace Violence.

Learning Objective #2:
Learn the four categories of Violent Acts.

Learning Objective #3:
Discuss some basic prevention methods that can be incorporated into your workplace and best practices.

Leslie Ptak is a compliance assistance specialist in the Madison OSHA office. Her responsibilities include outreach and training for Madison OSHA's 19-county territory and oversight of the office's cooperative programs, such as alliances and partnerships. She is the contact person for Madison's Voluntary Protection Programs (VPP) and can be found giving presentations across the state.

Her OSHA enforcement career began 29 years ago as an industrial hygienist compliance officer in the Wilkes-Barre, Pennsylvania and Los Angeles, California OSHA Offices. She worked as a technical information specialist in the Chicago Regional Office, and she has been a team leader in the Madison OSHA Office. Currently she is a compliance assistance specialist which means she has no enforcement authority at all.

Dealing with the Bully in the Workplace, New Ideas, Best Practices
Jon Anderson, Godfrey & Kahn SC

Thursday, October 16, 2014
1:15 pm-2:30 pm

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Strategic
Level: Intermediate

This session examines the growing issue of bullying behavior in the workplace. The line between bullying and unlawful harassment is often not clear. Experienced attorneys will review the applicable law and provide practical advice to identifying, effectively responding to and eliminating bullying behavior. Best practices and strategies for limiting your liability will also be addressed.

Learning Objective #1:
Attendees will gain a better understanding of how to recognize bullying behavior and the laws that are implicated when such behavior is present in the workplace.

Learning Objective #2:
Attendees will be exposed to current thinking and best practices to effectively address bullying behaviors in the workplace.

Learning Objective #3:
Attendees will learn what they need to do now to limit their company's liability in regard to bullying behavior.

Jon Anderson is the Madison Office Managing Partner and also serves as Chair of the Labor & Employment Law Practice Group. He exclusively represents management in all aspects of human resource, labor, and employment law matters. A significant portion of his practice is devoted to the representation of public, private and Charter schools, as well as serving as general or special counsel to school districts and institutions of higher education. Jon also is a member of the firm's Health Care Team, representing health care institutions and hospital systems in their employment and collective bargaining matters. Jon brings years of experience, and a practical no-nonsense approach to advising employers in labor and employment matters, and in helping them defend decisions they make concerning their employees. Jon counsels employers on matters involving employee discipline, personnel administration, employment discrimination and wage/hour claims, and in resolving matters arising under a wide range of state, federal and local laws including the Wisconsin Fair Employment Act, Title VII, the ADEA and the ADA. Jon has extensive experience advising both union and non-union employers concerning their rights and obligations under the National Labor Relations Act. He is frequently engaged to help employers define and attain their collective bargaining goals.

Current & Future Trends in Wellness and Population Health Management
Melissa Tobler, Hays Companies

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: General
Track: Rewards
Level: Intermediate

In the area of improving health and performance, the vast majority of employers focus their health care strategy on programs that improve health risk and reduce medical costs. Over the next three to five years, it is expected that employers are intending to shift that focus toward programs that improve workplace productivity and reduce absence. As they think more holistically about their employees, and not just how they offer health insurance, employers are building programs to help the employees manage their health. This session will explore why employers need to consider integrating their population health management with other organizational objectives in order to keep their wellness and population health initiatives viable and even take them to the next level!

After completing this course you will be able to:
-Identify 3 new trends in wellness programs
-List at least three reasons why wellness programs should consider integration with other organization initiatives.
-Identify three ways integrated data can benefit your wellness program

Melissa's position at Hays Companies draws on her career as a registered nurse for twenty years, during which time she has actively been involved in developing and overseeing case management, utilization review, quality assurance/improvement, and disease management strategies for insurance plans, vendors, and employers. Melissa is a patient advocate who has created win-win solutions for groups and employees, balancing the needs of the individual with the fiscal responsibilities of the group.

In her role at Hays Companies, Melissa partners with employers to understand the impact of health on their productivity, absenteeism, health plan costs, and ultimately profitability. She has worked with clients in strategically designing and implementing Population Health Management programs that complement the unique needs of each employer group.

Melissa, a member of the Nursing Honor Society, received her Bachelor's in Nursing from Marquette University and has completed her course work for her Master's in Business Administration. In 2007, she became the first benefits consultant to be certified in Clinical Outcomes Report Analysis by the Disease Management Purchasing Consortium. She has also received the designations of Health Insurance Associate and Managed Healthcare Professional from HIAA.

Diversity Through Mutual Respect
"Our Mission, Our Vision, Our Values
Mike Hesch, MASL and Arthur L. Peek, C.I.S.W.
Mayo Clinic Health System – Franciscan Healthcare

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Talent
Level: Basic

Through this interactive session, we will discuss how our Mission, Vision and Values support us in embracing diversity in our workplace and service to our diverse patient population. Our Mission is at the heart of all we do and guides us in our journey of embracing a diverse culture both in terms of where we have come from and what we are doing now, and where we want to go in the future.

Mike holds a Bachelor of Science degree in Community Health Education from the University of Wisconsin-La Crosse and a Master of Arts degree in Servant-Leadership from Viterbo University. He has worked for Mayo Clinic Health System-Franciscan Healthcare (MCHS-FH) since 1999 in various capacities, most recently in a leadership role for Organizational Learning and Development and Human Resources. Mike has served on numerous committees at MCHS-FH and Mayo Clinic. Additionally, Mike is a member of the Adjunct Faculty at Viterbo University and active public speaker/group facilitator.

Art Peek holds a Bachelor of Science degree in social work from the University of Wisconsin-La Crosse and a Master of Science degree in Social Work from the University of Wisconsin. He has worked for Mayo Clinic Health System-Franciscan Healthcare (MCHS-FH) since 1992 in various capacities, most recently as a Limited English Proficiency Coordinator and in Medical Social Services-Elder Care. Art serves on numerous committees at MCHS-FH: Diversity Council, Cultural Diversity, Ethics, Advance Care Planning, Abuse Policy Development, Alzheimer's research and Contributing writer to the Senior Spotlight News Letter. Art has extensive professional and personal experience in working with and advocating for individuals with special needs or aging infirmities

Drugs in Your Workplace…Understanding the Costs and How to Protect Your Company
Annie Short, Wisconsin Community Health Alliance and Dorothy Chaney, President of WI Community Health Alliance and Director of South and South East Alliance for Wisconsin Youth

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Rewards
Level: Basic

Injury, absenteeism, low production and unable to hire due to drugs is impacting companies' bottom line. Drug use is on the rise and employers need to ensure policies and measures are in place to address these concerns. This session will address the pieces that need to be in place for an effective drug free policy and time will be given to learn from each other.

Learning Objective #1:
What to include for an effective drug-free policy.

Learning Objective #2:
Basic understanding of the costs of drugs in the workplace.

Annie Short has been working in substance abuse prevention for the last eight years in Wisconsin. She was the Alliance for Wisconsin Northeast Regional Coordinator working with 17 counties to address substance abuse. Currently she is providing prevention efforts in Milwaukee County. She is also a member of the State Council on Alcohol and Other Drug Abuse (SCAODA) Prevention Committee and co-chairs the committee developing the "Wisconsin Heroin Epidemic: Strategies and Solutions" report. This report has recommendations specifically for the workplace, in which Annie led that subcommittee. Annie also owns a small construction business that her and her husband run out of their home.

Dorothy Chaney, president of Wisconsin Community Health Alliance, provides expertise in community health improvement planning and evaluation. Dorothy has also served as a contract trainer with the Center for Applied Prevention Technology, which is a part of the Substance Abuse and Mental Health Services Administration. Dorothy serves on the Wisconsin State Council on Alcohol and other Drug Abuse (SCAODA) Prevention Committee and served as Co-chair of the workgroups that produced SCAODA's reports: "Responding To Wisconsin's Prescription Drug Abuse Crisis: A Call To Action" and "Wisconsin' Heroin Epidemic: Strategies and Solutions." Dorothy has more than twenty years of experience in community organizing, adult education, and substance abuse prevention work. Dorothy is originally from Nova Scotia and currently resides in Marshfield with her two daughters.

Embracing the Challenge of Change
Tracy Butz, Think Impact Solutions

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Accountability
Level: Basic

One of the most valuable job skills you can have in today's world is to know how to change. Some changes we can control, others we can influence, and some situations we simply can't control. This program focuses on understanding the change process and learning key strategies to better manage personal reactions, allowing you to maneuver through change initiatives faster and easier. Discover how to be a change agent in unstable times, by adopting tools to overcome resistance, build resilience and protect productivity for you, your team and your organization.

Learning Objective #1
Understand the drivers of change and determine factors that impact your response, allowing you to better control your reactions to it.

Learning Objective #2
Realize how you can go from being stuck to embracing change, allowing you to maneuver through change initiatives faster and easier.

Learning Objective #3
Discover and adopt new tools for managing the challenges of change related to communication, resistance and productivity.

Tracy Butz, owner of Think Impact Solutions, is an inspirational speaker, captivating author and successful consultant. She is best known for engaging individuals and organizations, empowering them with innovative concepts and tools to live more productive, passionate and purposeful lives. Tracy has 19 years of experience actively engaging both large- and small-size audiences, from a wide range of industries, including the US Army, Motorola, Plexus, 4imprint, Women's Leadership Network, and Subway Restaurants, just to name a few. She is skilled in various areas including leadership development, candid conversations, embracing change, employee engagement, and interpersonal communication. If you need a speaker to quickly connect and provide applicable results-focused strategies, look no further than Tracy Butz!

Employee Handbooks
Mark Goldstein, Goldstein Law Group, S.C

Friday, October 17, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Accountability
Level: Advanced

Recent developments at the NLRB, EEOC, and at the state level mandate that we give a serious reading to our existing employee handbooks. This session will assist you in understanding recent rulings with respect to, for example, social media policies, bullying, confidentiality and non-competition, etc. In some instances, the language of your current policy may invites issues, such that it should be modified ASAP. In other instances, a policy should be added (or deleted). We will also examine best practices with respect to most frequently referenced policies – e.g. progressive discipline, harassment and discrimination, drug and alcohol testing, workplace violence and searches, etc. Although not mandatory, attendees are encouraged to bring their own employee handbooks.

Learning Objectives:
1. Whether your existing policies may be in conflict with recent NLRB, EEOC, and state court decisions with respect to social media, confidentiality, etc.
2. The interplay between the language of your employee handbook and the Wisconsin Unemployment Division's new definitions of "misconduct" and "substantial fault."
3. The most significant elements of confidentiality, non-competition, and non-solicitation policies.

Mark Goldstein is President of Goldstein Law Group, S.C., a boutique law firm serving as outside general counsel to businesses big and small, with a focus on labor and employment issues, business litigation, and implementing proactive measures designed to avoid the legal pitfalls that might otherwise drain their finances, energy, and other resources. Mark is not only an attorney but also a business owner, an elected official, and supplemental court commissioner. Mark received his B.A. from the University of Wisconsin-Madison in 1989 and his J.D. from the University of Wisconsin Law School in 1994. He is licensed in Wisconsin, Illinois and numerous Federal Districts and Circuits. Mark is a member of the State Bar of Wisconsin, the Milwaukee Bar Association, the American Bar Association, LERA, and SRKA (Wisconsin SHRM's Racine Kenosha Chapter). He is active in the State Bar, the MBA, and a frequent speaker and writer on labor and employment law and other topics. He is presently Wisconsin SHRM's State Government Affairs Director.

ERISA 401(k) Plan Fiduciary Risk-Un-complicating It, Taking Control of It and Reducing It
Debbie Castellani & Bill Conrad, Akros Fiduciary Management OTB Strategic Consulting, Inc.

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: Business
Track: Rewards
Level: Basic

When you are a fiduciary for a 401(k) Plan, it means that you are in charge of the risk involved. At first glance, managing risk in this area can see overwhelming, time-consuming and complicated in keeping up with three governing regulatory agencies – the DOL, IRS and PBGC. However, there are strategies to un-complicate regulations and streamline operations to help reduce Plan Sponsor and personal risk. This presentation will provide you some hands-on and practical risk management techniques, uncover hidden risk areas such as revenue sharing, TDFs, and RFPs and review roles and responsibilities you, as fiduciary, need to know to further reduce risk and liabilities.

Learning Objective #1

Understand the top plan sponsor myths and how to avoid them.

Learning Objective #2
Learn the five things you can do today to reduce personal fiduciary risk – yes, you are at risk!

Learning Objective #3
Review three things you must do to reduce Plan Sponsor risk

Deborah "Debbie" Castellani and William "Bill" Conrad founded OTB Strategic Consulting, Inc. in 2002 to un-complicate the complicated by implementing sound growth strategies, streamlining regulatory policies and procedures, and transforming organizations from Fortune 500 businesses, start-ups and everything in between. In 2002, Ms. Castellani and Mr. Conrad also founded Akros Investments, Inc. aka Akros Fiduciary Management, which provides premier fiduciary-based investment-education related services for individual, companies, and retirement plan fiduciaries. Ms. Castellani has run a $2 billion investment firm, created investment programs, established mutual funds, set up SEC compliance programs, performed merger and acquisition studies, overseen the P&L, established and was a fiduciary for defined benefit and defined contribution plans, and worked with numerous firms in a variety of industries. Mr. Conrad began his financial career after law school and has run a $3.5 billion trust division including its Benefits area, was Chairman of a multi-state broker/dealer, run two multi-bullion dollar 1940 Act investment firms. He has been integral in creating new mutual funds, performing M&A, performed merger and acquisition studies, running SEC compliance programs, established and been a fiduciary for defined benefit and defined contribution plans, and worked with numerous firms in a variety of industries.

Ethics & Leadership: Developing Social Responsibility
Justin Rueb, University of Wisconsin-Stevens Point

Friday, October 17, 2014
8:30 am- 9:45 am and 10:00 am-11:15 am

HRCI Credits: General
Track: Accountability
Level: Basic

In today's world, organizations are often criticized for breaches in ethics and for a lack of social commitment suggesting an ethics training need for leaders. This session will focus on understanding what ethics are, how and why organizations develop ethical codes and their importance in developing leaders of integrity focused on social responsibility. Specifically, attendees will examine their own values, how these values are then used in developing their personal ethical code, which in turn, affect both leadership and organizational development. Attendees will learn various personal tools and approaches to improve ethical leadership and assist them in creating strong organizational cultures committed to social responsibility. The session will involve several activities that require audience participation in an effort to personalize one's own experience with their ethical and leadership experiences.

Learning Objective #1:
To understand what ethics are, how they are derived, and their importance at work.

Learning Objective #2:
To understand how ethics impact leadership and organizational strategy.

Learning Objective #3:
To understand organizational ethics and its impact on a company's social commitment.

Dr. Justin Rueb is a certified SPHR, a full professor at the University of Wisconsin-Stevens Point, and is also President of Aspiring Heights, an independent training and organizational consulting firm specializing in leadership, team-building, and organizational culture and climate. He has worked with a variety of organizations in the military, academic, and corporate sectors. His doctoral research examined potential predictors to identify emergent leaders within an organization. He has also performed research in areas as diverse as human factors, cognition, motivation, systems design, human resources, leadership, statistics, and sexual harassment, having authored over 90 articles/presentations. A nationally recognized speaker, Dr. Rueb has presented papers at numerous prestigious conferences, including the Academy of Management, Society of Industrial/Organizational Psychologists, American Psychological Society, and the Human Factors Ergonomics Society.

Extreme Makeover: Health Care Edition/ Radical Savings from Benefits Strategies
Patty Murphy, HNI

Thursday, October 16, 2014
1:15 pm-2:30 pm

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Rewards
Level: Basic

With ever-increasing health care costs and the looming "Cadillac tax" deadline, health plan sponsors need to be more creative than ever. Gone are the days of negotiating your renewal down as far as you can and then cost shifting the rest to your employees. If you want to stay in the game, you need to start changing it! At this workshop, attendees will discover today's most innovative benefits and health care management strategies. Learn specifics on how to launch programs — where to access products or how they may fit into existing plans. Attendees will walk away with real-life examples of these strategies in action and the impact they are creating for other organizations.

Learning Objective #1:
Discover how basic business and economic principles can be applied to health benefits.

Learning Objective #2:
Understand the trifecta of health benefits savings: coordinating care, maximizing quality, and engage customers .

Learning Objective #3:
Explore strategies including: accountable care organizations, direct primary care, telemedicine, private exchanges, value-based insurance design, and on-site/near-site care.

Patty Murphy is Health Systems Consultant at HNI. As a former hospital administrator, Murphy possesses deep knowledge of the health care system, which she uses to help employers reduce wasteful health care spending and improve care quality.

Followership: Four Secret Skills for Being the Leader Others WANT to Follow
Cory Bouck, Johnsonville Sausage

Thursday, October 16, 2014
1:15 pm-2:30 pm

HRCI Credits: General
Track:Accountability
Level: Basic

In today's hyper-competitive world, who's working hard to be known as a great "follower," right? But the best leaders begin their journey by developing strong followership skills. Business icons like Sam Walton, Malcolm Forbes, and P&G's A.G. Lafley practiced followership relentlessly as they progressed. Why? Because all leaders are also still a follower of someone to whom they are accountable. Even the VP of HR has a boss. Mastering the four roles and secret skills of followership will ensure success in the paradoxically simultaneous roles of follower and leader. Living the roles and secret skills of followership will deliver better results, get you promoted faster, and inspire those around you to do the same.

Learning Objective #1:
Earn a reputation for strong leadership at every level by learning and practicing the four roles and secret skills of great "followership."

Learning Objective #2:
Learn to motivate others by setting a sterling example of leadership through your followership.

Learning Objective #3:
Develop your career so you can market & sell your own authentic "accomplishment brand."

Cory Bouck is the Director of Organizational Development & Learning at Johnsonville Sausage. He is also an author, keynote speaker, and an expert in building leaders - a reputation he has earned over twenty years of leading in the military, in academia, in business, and in politics. He is a graduate of and former leadership instructor at the U.S. Naval Academy and is a former Naval Flight Officer. Cory led brand and event marketing teams at General Mills, Newell-Rubbermaid, and Johnsonville Sausage. He is also the author of The Lens of Leadership: Being the Leader Others WANT to Follow (2013).

Gamification in Human Resource Management: An Introduction
Michael Maciekowich, Astron Solutions, LLC

Thursday, October 16, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Rewards
Level: Basic

Gamification is the use of game thinking and game mechanics in non-game contexts to engage users in solving problems. Gamification is applied to improve user engagement, return on investment, data quality, timeliness, and learning. Gamification techniques strive to leverage people's natural desires for competition, achievement, status, self-expression, altruism, and closure. A core gamification strategy is rewards for players who accomplish desired tasks. Types of rewards include points, achievement badges or levels, the filling of a progress bar, and providing the user with virtual currency. This session will provide a review of the foundation principles of gamification as it applies in Human Resource strategies. This session will also provide basic examples of the application of gamification in reinforcing key HR strategies from engagement to career progression.

Learning Objective #1:
Understanding what "Gamification" is and its application to HR Strategy.

Learning Objective #2:
Review examples of "Gamification" specific to HR programs and learn how these enhance the organizations work environment.

Learning Objective #3:
Explore the unlimited uses and implications of 'Gamification" in all future HR program design.

Michael F. Maciekowich is a National Director for Astron Solutions. His areas of expertise include the development, design, and implementation of executive, physician, and employee base pay, short and long term incentive programs, sales incentive programs and performance management systems in all industries. His primary focus is the integration of compensation and human resource strategies with organization-specific missions, visions, values, and strategic operating plans. Michael has over thirty years of consulting and industry compensation experience. Prior to Astron, Michael was the National Director of Healthcare Rewards Consulting and the Metro New York Operations Manager for Rewards Consulting for the Hay Group. He was also compensation consultant with a number of consulting firms, including Towers Perrin (Senior Consultant), Hartstein Associates (Vice President), Adams, Nash & Haskell (Vice President), The Omni Group (Vice President and Partner), and Modern Management (Senior Consultant). In these roles, he focused on the role compensation plays in human resources and labor avoidance strategies. He has assisted hundreds organizations in his twenty plus years of consulting. Prior to his consulting career, Michael was responsible for compensation services at the American Hospital Association, Honeywell International, and Zenith Electronics.

Global Essence: Building and Benefitting Strategy and Culture with Perspectives!
Deborah Schultz, MRA

Friday, October 17, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Accountability
Level: Advanced

Succeeding in a global business environment – whether where your organization does business, where your customers or suppliers reside, or where your employees have roots – requires a deeper level of awareness in order to capitalize on the cultural differences that can so richly enhance your organization. This session will help you consider your own level of competence, heighten your knowledge around fostering a richer and more innovative work environment and expand your understanding of cross-cultural impact on your business and your relationships with your employees who represent multiple perspectives. Building corporate culture and global competence can be an enduring competitive advantage. Emerge a leader – whether individually, collectively or organizationally as you practice and embrace a revitalized, recaptured or reinvented 'global essence!'

Learning Objectives –
1. Understand how to effectively include, enhance and benefit from diverse perspectives to focus your organization on high performance and business success.
2. Learn and apply the framework of a global essence strategy that can complement and enhance overall business strategy, plus cultivate inclusion, organizational development and organizational performance.
3. Discover ways to leverage talents to complement and create an organizational culture rich in global and leadership competence that translates across borders.

Deb Schultz shares her broad and practical knowledge on integrating HR with business strategy, her experience in relationship management – and more! She works passionately on behalf of MRA members as a Sr. HR Director/Member Relations. Prior to MRA, Deb had the privilege of serving in leadership and management roles for industry-leaders US Bank (formerly Firstar) and Carlson Companies. Deb is objective, thorough, energetic and dynamic and speaks nationally on key drivers of, and strategies for, organizational and HR performance. Deb is GPHR and SPHR certified and is WISHRM's Director of Programming.

Hello CEO…Here is HR
Lori Kleiman, HR Topics

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: Business
Track: Strategic
Level: Advanced

CEO's see HR Functions as administrative and costly. Explore the issues and gain practical tips, ensuring your CEO values what your HR team brings to the organization. We step into your CEO's shoes and provide real solutions to the issues you may be facing. Get involved in the strategic conversations that drive your business forward. Approaching the topic from a proprietary survey of real business issues, you will walk away with solutions in hand. Do you struggle with getting your CEO's attention? Do you feel stuck in compliance and administration? How do you expand your perspective—and get the recognition you deserve?.

Learning Objective #1:
Understand what your CEO needs from you.

Learning Objective #2:
How to present your initiatives in way that the CEO will listen.

Learning Objective #3:
Evaluate your skill set and growth opportunities to become the leader your organization needs.

Lori Kleiman is a Chicago based business expert with more than 25 years of experience advising companies on HR issues. Her background as a human resources professional and consultant gives her unique insight on how HR professionals and executives can work together effectively to achieve business goals. Her programs are designed to provide critical HR updates and best practices to small businesses. In addition, she is an adjunct faculty member at Oakton Community College and DePaul University. Previously, Lori founded HRPartners, a boutique HR consulting firm that was acquired by Arthur J. Gallagher & Co. in 2007. Lori continued with Gallagher to lead the firm's HR consulting practice before branching out again as an independent consultant, author and speaker. Lori has a Master's degree in human resources, has been certified as Senior Professional in Human Resources (SPHR) by the HR Certification Institute and is a member of the National Speakers Association.

How to Be a Super Sleuth: Preparing for and Conducting Effective Workplace Investigations
Kelly A Moffitt and Colton D Long, Ogletree Deakins

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Accountability
Level: Basic

Human resources investigations have become more important for reasons of personnel management, productivity, and litigation risk avoidance. The range of matters that are the subject of investigations has become broader. The benefits of conducting a proper investigation and the potential liability for mistakes during investigations have become greater. Investigations can help solve workplace conflict, can be decisive in determining whom to discipline or terminate, and can lay the groundwork for a successful defense or can result in liability in employment litigation. Moreover, because the technology of monitoring conduct within the workplace is constantly changing, employers need to stay abreast of which forms of employee investigations will stand legal muster, and which forms might get the employer – instead of the employee – in trouble. This presentation will focus on the steps to be taken before the need to investigate arises, as well as walk through best practices for the investigative process itself.

Learning Objective #1:
BEFORE THE INVESTIGATION – GETTING YOUR PERSONNEL POLICIES IN ORDER. Any investigation is only as good as the tools you have available to you. One of the most important sources of tools for an effective investigation is your company's personnel policies. There are a number of policies that you should have in place before the need for an investigation ever arises. Some of these policies are quite obvious, and nearly all companies already have them. Unfortunately, the need for other policies only becomes apparent once an investigation is already underway, and it is too late to adopt them.

Learning Objective #2:
POST-COMPLAINT, PRE-INTERVIEW STEPS. A prerequisite to the employer's ability to conduct a timely investigation is for the employer to receive prompt information about matters to be investigated. In order to encourage the reporting of matters that may become subject of investigations, employers should create a corporate culture that encourages employees to come forward with complaints.

Learning Objective #3:
BEST PRACTICES FOR CONDUCTING AN INVESTIGATION. An effective workplace investigation requires both training and planning. This presentation will provide tips on deciding who should/should not conduct the investigation, pre-interview preparation, conducting interviews, interviewing the complaining party, interviewing the accused, interviewing third-party witnesses, resolving credibility, and more.

Kelly Moffitt's practice is focused on employment litigation. She represents clients in agency and court proceedings in matters including discrimination, retaliation, harassment, whistleblowing, and non-compete and trade secret disputes. She has defended clients in class action lawsuits arising under wage and hour laws, ERISA, and the WARN Act. She has also successfully defended numerous cases arising under the FMLA. Kelly's trial experience includes first chairing an arbitration, in which she obtained an award dismissing all claims against her client. Kelly also provides employment counseling advice to clients, and was seconded to a national company for several months to serve as the company's interim labor and employment law counsel. In addition to her employment litigation work, Kelly is also experienced in commercial and business litigation, including securities class actions, contract disputes, and products liability defense. Kelly regularly speaks at seminars on employment-related topics.

Colton Long is an associate with Ogletree Deakins and focuses his work on employment litigation. He has had considerable motion experience in his time in practice, and recently argued in the Court of Appeals for a significant case that stands to reinterpret Minnesota's motion to dismiss standard (now pending before the Minnesota Supreme Court). Prior to joining Ogletree, Colton worked for a large general practice firm as a business litigator, and specialized in franchisor/franchisee relations, non-compete agreement litigation, and FLSA wage and hour claims. Prior to beginning his practice, Colton served as a judicial intern for the Honorable John A. Jarvey of the United States District Court for the Southern District of Iowa and the Honorable Matthew E. Johnson, Judge of the Minnesota Court of Appeals.

How to Be Smart About Costs In the Midst of Turmoil
Jane Cooper, Patient Care

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Metrics
Level: Intermediate

The Affordable Care Act provides many reasons for health care costs to increase and employers are implementing various strategies to combat these rising costs. Concurrently, narrow networks and fewer available providers due to consolidation and reduced reimbursement mean fewer choices for your employees and their families. This session offers successful strategies for improving the health of your employees while reducing costs. Discussion will include examples of growing trends like on-site clinics, enhanced wellness programs and transparency. As employees access insurance through a variety of channels (public and private), employers continue to struggle with how to provide benefits. Employers need to use historical data for planning and decision making. Employee communication and engagement is a critical component of cost management and successful examples will be provided. Content includes case studies from Wisconsin companies.

Learning Objective #1:
Identify key costs drivers within benefit plans.

Learning Objective #2:
Discuss ways to engage employees to pay attention to health care costs and their health status.

Learning Objective #3:
Review data categories that are critical to managing health care costs.

Jane Cooper is founder, President and CEO of Patient Care, the nation's leading advocacy company, based in Milwaukee, WI. The company began operations in August, 2001 and helped create the advocacy industry. Patient Care currently provides services for over 1.5 million members across the country. Ms. Cooper has over 25 years experience in the health care industry, serving in management positions for 20 years. As a serial entrepreneur, she has started and led five health care companies since the early 1980s. As President and CEO of Advantage Health Plan in New Orleans, Louisiana, she developed the fastest growing HMO in the state in the late 1990s. As President and CEO of Patient Care she has also consulted and spoken nationally on health care issues and publishes articles on the industry on a regular basis. Ms. Cooper has a Bachelor's of Liberal Arts from Augustana College in Illinois and a Master's of Art from Western Illinois University, with a major in speech and communication. She serves on the board of the Wisconsin Statewide Health Information Network (WISHIN).

HR Metrics: ROI for HR Initiatives
Lynell Meeth, MRA- The Management Association

Thursday, October 16, 2014
10:45 am-12:00 pm

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: Business
Track: Metrics
Level: Basic

The increasing use of metrics and data analytics is challenging HR professionals to understand the importance of using numbers for fact-based decision making and linking HR initiatives to organization success. This presentation will provide you with practical advice on how to cost-justify and present the business case for your HR-related initiatives.

Learning Objective #1
Identify best practices in HR ROI measurement.

Learning Objective #2
Determine the cost and benefits of HR initiatives in business terms.

Learning Objective #3
Use a model to demonstrate HR solutions to business problems.

Lynell is a Human Resources Director for the HR Resource Center Department. She has over 10 years of broad human resource generalist experience working in the financial services industry with multi-state responsibilities. Her human resource experience includes management development, succession planning, assessments, mergers and acquisitions, employee relations and investigations, recruitment and retention strategies, and strategic solutions. She is an experienced trainer in the areas of management and professional development and diversity. She has been a guest speaker for university leadership functions on career management and diversity and has received training in internal consulting, co-active coaching, and situational leadership. In her career, Lynell has used her strengths in relating to others and her passion for moving from "good to great" to help inspire, coach, and encourage team members. She has a Bachelor of Science degree in psychology and communication management from Carroll University and a Master of Science degree in human resources from Marquette University. She is certified as a Senior Professional in Human Resources (SPHR).

Humanizing Employee Engagement
Paul Hebert, Symbolist

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: General
Track: Talent
Level: Intermediate

The past few years have seen a major increase in the number of companies that offer technology solutions to HR that are focused on employee engagement. While these new SaaS products have reduced the cost and the set up effort required within HR they inadvertently have reduced the effectiveness of engagement within the organization. In fact, as HR and companies in general, have increased their budgets and efforts around engagement – the numbers continue to drop. Employees are not looking for electronic connections – they are looking for real, authentic, personal and human connections. This presentation will present why humans need real life emotional connections, how technology is failing us in our quest for engagement and provides concrete examples of companies who are creating emotional connections.

Learning Objective #1:
Learn the psychological basis for why humans need connections and engagement.

Learning Objective #2:
Understand the ways in which technology fails as creating engagement -- and the ways in which it can.

Learning Objective #3:
See concrete examples of companies leveraging connecting and engaging with and without technology.

Paul Hebert is Vice President Solution Design for Symbolist, a consultancy and fulfillment organization that creates "human" programs that connect employees and other audiences to the sponsor organization at an emotional level. Paul is widely considered an expert on engagement, rewards, recognition, motivation and incentives and has been interviewed by the BBC, quoted in USATODAY, published in Loyalty360 magazine, published whitepapers and articles for HRM Magazine, is a contributing author on the Fistful of Talent blog, HRExaminer and is the Social Media Editor for the Enterprise Engagement Alliance.

It's a Game! Effective Strategies for Engaging Employees Around Sustainability
Kathy Kuntz and Raj Shukla, Cool Choices

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Accountability
Level: Basic

Many leading businesses have dual challenges: managing stakeholder costs/expectations relative to sustainability metrics and effectively engaging employees around corporate objectives. Typically there's little or no connection between these priorities, but HR professionals can be the catalyst for outstanding organizational achievement in both arenas by engaging employees around sustainability. Drawing from extensive social science research and real-world experience implementing initiatives in a variety of employment settings, the presenters will delineate the advantages of connecting sustainability and engagement, and provide attendees with practical strategies for making this happen. Following a brief overview of the advantages and key strategies, the presenters will engage participants in small group exercises where groups will develop their own solutions to specific sustainability-engagement challenges. The combination of theory and practice will enable attendees to understand the challenges in engaging employees around sustainability, while providing insights into practical strategies and techniques that they can use to increase engagement.

Learning Objective #1:
Participants will be able to articulate the business case for engaging employees around sustainability as a strategy for increasing overall engagement and accelerating achievement of sustainability targets.

Learning Objective #2:
Participants will be able to identify opportunities for engaging employees around sustainability to increase innovation and performance.

Learning Objective #3:
Participants will be able to develop and implement specific initiatives to increase employee engagement around corporate-specific sustainability objectives in their specific workplaces.

Joining Cool Choices in May 2010, Executive Director Kathy Kuntz provided the foundational vision and expertise for Cool Choices' program initiatives, which inspire individuals, businesses and communities to adopt sustainable practices. Kathy has two decades of experience promoting energy efficiency to businesses, communities and individuals. As Director of Energy Programs for Wisconsin Energy Conservation Corporation, Kathy led Focus on Energy, Wisconsin's energy efficiency and renewable energy program. Under Kathy's direction Focus on Energy exceeded its savings goals and deployed a number of innovative initiatives to broaden and deepen customer engagement. Kathy has earned a national reputation for effective program design and behavior change expertise.

Director of Programs Raj Shukla joined Cool Choices in January 2011 to lead the organization's program efforts. With a strong commitment to addressing climate change and a passion for genuine results, Raj developed the idea to use a game-based approach to make sustainability fun, social and easy. Raj has a strong background in social change, sustainability and economic development, including founding and acting as principal of BrightBend, LLC, where he worked with small businesses on using technology to affect social change and educated corporate executives on the organizational benefits of waste reduction. Prior to BrightBend, Raj managed engaged youth in climate change education using games with The Climate Project and served as Program Officer for the Greater Milwaukee Committee, where he managed a $1.5 million private/public sector inner city reinvestment campaign. Raj thrives on the challenge of making sustainable actions more fun, popular and easy.

Making a Wellness Program Work & Measuring its ROI
Rick Schemm, HP&A Solutions

Thursday, October 16, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Metrics
Level: Intermediate

There are many ways to administer a wellness plan in an organization, but there's a wide range of complexity, cost, and effectiveness in the options. This session will describe the elements of going "all-in" and running a sophisticated wellness program that creates great participation, decreases the health risk factors of employees, and saves the organization money. The session will also describe how Return on Investment is measured so that you can build your wellness plan with a defined way of measuring its success.

Learning Objective #1:
Attendees will learn about the necessary elements for an effective wellness program that changes employee behaviors around their issues of health and reduces their medical costs in the organization's insurance plan.

Learning Objective #2:
Attendees will also learn how to use medical claims data and risk-factor measurements to identify the return on investment of a company-sponsored wellness program.

Rick is a Human Resource Consultant for HP&A Solutions, a provider of HR, payroll, and accounting services and guidance to small organizations. Rick was the HR Executive at Royal Credit Union for 23 years and has had many experiences in the field of Human Resource Management. While at RCU he designed and implemented Performance Management Systems and Compensation Programs, Upward and Peer Feedback Systems, Contingency and Succession Planning, the automation of the Applicant Data collection process, and the introduction of a comprehensive Wellness Program. In his role as a HR Consultant, Rick helps business owners and managers implement or update systems in the areas of recruitment and selection, performance reviews, coaching, discipline, leadership, culture development, employee benefits, and compensation. Rick holds a Masters Degree in Management and Organizational Psychology from the University of Wisconsin-Milwaukee, a Bachelors Degree in Management from the University of Wisconsin-Eau Claire, and a Senior Professional in Human Resources certification from the Human Resource Certification Institute.

Making the Pieces Fit: How the Supreme Court's Decision on DOMA Impacts Your Organization
Regan Cheney and Rebecca Kellner,
Associated Financial Group

Thursday, October 16, 2014
1:15 pm-2:30 pm

HRCI Credits: General
Track: Rewards
Level: Basic

Last summer, the Supreme Court overturned a section of the Defense of Marriage Act, which previously defined marriage as between a man and a woman. As a result, states are left to define what constitutes "marriage." Under federal law, same-sex spouses who are married in a state or country that recognized same-sex marriage are entitled to the same federal benefits as other legally married spouses. Coordinating this with state laws, especially for multi-state employers, can be a daunting task. This seminar has been designed by licensed attorneys and HR professionals. It will identify key issues for not only Wisconsin employers, but also for any multi-state employer. Key issues include the impact of the High Court's decision on health insurance, HIPAA, COBRA, and on other non-ERISA type benefits offered by the employer, as well as employer policies and federal and state tax implications. In addition to the legal issues, this presentation will touch on practical implications so companies can walk away with the information to create the best strategy that fits not only the legal landscape, but also the organization's culture.

Learning Objective #1:
Understand the impact of the Supreme Court's decision and compare federal regulations (ERISA, COBRA, HIPAA and IRS regulations) with various state laws.

Learning Objective #2:
Identify practical considerations in order to create effective compensation and benefits strategy, which fits the organization's culture and risk tolerance.

Learning Objective #3:
Discuss how other Wisconsin employers have modified their compensation and hiring and retention strategies after the fall of DOMA.

Ragan Cheney brings a wealth of knowledge in insurance defense litigation, risk avoidance and in recruiting and retaining key employees. Her expertise comes from representing several of the most well-respected professional malpractice and property and casualty carriers in the country. Prior to joining Associated Financial Group, Ragan advised employers of all sizes regarding proper employment practices, recruiting and retention trends. Since joining the HR Solutions team in 2007, Ragan works regularly with public and private employers on HR Compliance issues involving leaves of absences, workplace accommodations, unlawful harassment, social networking benefits and risks, wage and hour obligations, as well as with employee benefit compliance issues involving ERISA, COBRA, HIPAA and workplace wellness. She is a welcomed guest at many executive round table meetings and is recognized as possessing superior skills in "building relationships" and "motivating individuals to help establish valued cultures in both corporate and non-profit sectors." Ragan is a member of the National and Fox Valley SHRM chapters. She enjoys presenting on a variety of HR, employee benefits and leadership development topics at state and local SHRM meetings in both Wisconsin and Minnesota. She is licensed to practice law in Wisconsin, Pennsylvania and New Jersey.

Rebecca Kellner, JD, SPHR is an HR Consultant for Associated Financial Group with six years of experience advising both public and private employers regarding complex employment issues. She advises employers on leave policies, accommodations, discrimination, and early intervention with claims. While in private practice, she focused on defending workers' compensation claims and handling Medicare-related issues arising from those claims. Previously, she interned with the Equal Employment Opportunity

Commission. Rebecca received her Bachelor of Business Administration degree from the University of Wisconsin-Eau Claire, where she majored in Human Resource management. She graduated from Marquette University Law School and is licensed in Wisconsin. Rebecca recently became SPHR-certified and is a member of National SHRM.

Measuring and Maximizing Employee Engagement in Your Organization
Regan Cheney and Rebecca Kellner
Associated Financial Group

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: General
Track: Metrics
Level: Intermediate

About 9 in 10 human resource managers believe employee engagement is a top staffing challenge. However, only 4 in 10 companies actually measure or track employee engagement. Organizations that focus on building employee engagement have the ability to maximize performance, morale and overall job satisfaction. Similarly, organizations that fail to address engagement risk suffering significant financial losses related to low productivity, high turnover, loss of organizational good will and even an increase in employment related litigation. Employee engagement is about strategically building a positive corporate culture and helping employees feel a sense of purpose, connection and loyalty. As Jack Welch, former CEO of General Electric, once said: "[No] company, small or large, can win over the long run without energized employees who believe in the [organization's] mission and understand how to achieve it." Join us for this presentation and learn why "employee engagement" is not just another corporate buzz word, but a key factor—if harnessed properly—that can maximize an organization's success.

Learning Objective #1:
Understand how successful organizations are defining and measuring engagement.

Learning Objective #2:
Identify the benefits of maximizing engagement and the hard and soft costs if ignored.

Learning Objective #3:
Learn how to maximize key engagement drivers, such as brand loyalty, commitment to the organization, and connection to work.

Ragan Cheney brings a wealth of knowledge in insurance defense litigation, risk avoidance and in recruiting and retaining key employees. Her expertise comes from representing several of the most well-respected professional malpractice and property and casualty carriers in the country. Prior to joining Associated Financial Group, Ragan advised employers of all sizes regarding proper employment practices, recruiting and retention trends. Since joining the HR Solutions team in 2007, Ragan works regularly with public and private employers on HR Compliance issues involving leaves of absences, workplace accommodations, unlawful harassment, social networking benefits and risks, wage and hour obligations, as well as with employee benefit compliance issues involving ERISA, COBRA, HIPAA and workplace wellness. She is a welcomed guest at many executive round table meetings and is recognized as possessing superior skills in "building relationships" and "motivating individuals to help establish valued cultures in both corporate and non-profit sectors." Ragan is a member of the National and Fox Valley SHRM chapters. She enjoys presenting on a variety of HR, employee benefits and leadership development topics at state and local SHRM meetings in both Wisconsin and Minnesota. She is licensed to practice law in Wisconsin, Pennsylvania and New Jersey.

Rebecca Kellner, JD, SPHR is an HR Consultant for Associated Financial Group with six years of experience advising both public and private employers regarding complex employment issues. She advises employers on leave policies, accommodations, discrimination, and early intervention with claims. While in private practice, she focused on defending workers' compensation claims and handling Medicare-related issues arising from those claims. Previously, she interned with the Equal Employment Opportunity Commission. Rebecca received her Bachelor of Business Administration degree from the University of Wisconsin-Eau Claire, where she majored in Human Resource management. She graduated from Marquette University Law School and is licensed in Wisconsin. Rebecca recently became SPHR-certified and is a member of National SHRM.

Mergers & Acquisitions- Due Diligence Processes
Patrice Hoeschele, MRA-The Management Association

Thursday, October 16, 2014
1:15 pm-2:30 pm

HRCI Credits: Business
Track: Strategic
Level: Intermediate

M&A continues to increase since the economic downturn. Regardless of company size, today's HR professionals need to have strategic skills for assessing benefits and risks in the due diligence. Additionally HR leadership must be prepared to participate in strategic dialog with executive leadership throughout this process.

Learning Objective #1
Learn the keys to M&A due diligence planning and execution success.

Learning Objective #2
Learn about the 4 stages of a Merger/acquisition.

Learning Objective #3
The risks of executive(s) perceptions, assumptions and reactions to the due diligence process.

Described by colleagues as optimistic, driven and enthusiastic, Patrice is a multi-disciplined, experienced professional. Her leadership style and passion focus on coaching individuals and teams, challenging others towards creative, continuous improvement. She models the philosophy of John F. Kennedy, "Leadership and learning are indispensable to each other."

Certified as a CQA (Certified Quality Auditor) and SPHR (Senior Professional in Human Resources), Patrice breaks down complex processes into streamlined, intuitive, cross functional systems across a variety of industries. She consistently demonstrates thoughtful and creative solutions to challenges, developing credible rapport throughout organizations.

Patrice holds a B.S. degree in Business Administration from Cardinal Stritch University, Milwaukee, WI, with continued education at Marquette University and the Milwaukee School of Engineering.

Modernize Your HR Practice! A Strategy Session
Mike Bollinger, Oracle

Thursday, October 16, 2014
10:45 am -12:00 pm

HRCI Credits: General
Track: Strategic
Level: Basic

Globally integrated value chains, the accelerated rate of Changes in the business environment have placed a premium on organizational agility and adaptability. This has shifted expectations of the HR function. Consequently drivers for excellence in HR have changed. We will discuss how technology advances help organizations better manage people and learn where you should focus your efforts. Technology innovation, and the social and mobile revolutions have rendered large segments of some industries obsolete. The pace of change is faster than ever, and HR functions face a number of new challenges as they support the strategy of their businesses operating in this new era. In this session, we will explore the role that HR functions can play in serving as catalysts to business agility and resilience. Our discussion will include current HR Transformation trends, and the impact that various disruptive technologies are having on the HR working assumptions. Finally, we will also take a look at the impact of HR big data on manager self service, and people decisions more broadly.

Mike has over 25 years of rich business, HCM and technology experience. Mike's work at Oracle includes developing the HCM Value Consulting content, value analysis tools and management of a National Value Consulting practice before joining the business transformation team. Mike also worked at SAP for 7 years in their HCM Center of Excellence. Mike has been formally trained and certified in a number of disciplines including Human Capital Strategy, Strategic Workforce Planning, Value Engineering and Business Process Transformation.

Moving Forward with Health Care Reform
Adam Jensen, Cottingham & Butler

Thursday, October 16, 2014
3:30 pm-4:45 pm

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: General
Track: Rewards
Level: Basic

Health Care Reform and the Affordable Care Act (ACA) is at the forefront of everyone's minds, and for many employers it presents an overwhelming challenge of understanding the potential impact it will have on their business. During this session, attendees will have direct access to legal expertise to learn more about the ever-changing ACA provisions, how to ensure plan compliance, and discover key strategies that will improve the health and welfare of their employee benefit program.

Learning Objective #1:
Understand the current state of the Affordable Care Act, including plan design and eligibility requirements.

Learning Objective #2:
Understand the provisions and penalties of the Employer Shared Responsibility rules, "Play or Pay" mandate, and how to comply.

Learning Objective #3:
Learn key strategies to keep your employee benefit plan compliant and competitive under the current Health Care Reform guidelines.

Adam P. Jensen, Vice President with Cottingham & Butler, has worked in the insurance and employee benefits industry since 1986. He specializes in providing regulatory compliance and plan design services for health and welfare plans. He also advises executive clients on non-qualified deferred compensation issues. Prior to joining Cottingham & Butler, Adam was the Senior Compliance Officer for Virchow Krause Employee Benefits, LLC. He was previously a manager in the human capital practice of a Big Four accounting firm and has also served as an in-house ERISA attorney for a well-known national financial and retirement plan services firm.

Personal Branding for Human Resources: Navigating the Social Web in Strategic Ways
Lauren Ruettimann, Punk Rock HR LLC

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Talent
Level: Basic

These days, it's increasingly important for HR leaders to manage the risks of the internet while leveraging the benefits of the social web. From LinkedIn to Pinterest, human resources professionals must navigate the web in strategic ways while paying attention to personal branding and professional branding trends. In this session, Laurie Ruettimann will provide you with concrete ways you can establish a personal and professional brand on the internet while maximizing your efforts and minimizing wasted time.

Learning Objective #1:

Defining a personal and professional brand and distinguishing between productive behavior and wasted time.

Learning Objective #2:
Identifying influential people and trends and discerning between professional websites and risky endeavors and platforms.

Learning Objective #3:
Creating a strategy to establish a harmonized personal and professional brand that will lead to greater HR career development opportunities through the social web.

Laurie Ruettimann pushes the boundaries of what's really possible in Human Resources. Her expertise as a HR leader in Fortune 500 organizations, such as Pfizer, Alberto-Culver, and Kemper Insurance, allows her to frame the HR world as it used to be known. Now, as a woman in the thick of the social world, Laurie understands how the digital space has changed the way HR needs to think and act. Laurie is SPHR-certified and an influential speaker, writer, and social media strategist. You may know her as the creator of Punk Rock HR, which Forbes named as one of the top 100 websites for women. She is the founder of The Cynical Girl and The HR Blogger Network. She is also the co-founder of HRBloggers.com and HRMToday.com, the first social networks created for HR professionals. But the digital world is just the starting point for Laurie. She is a contributing editor for The Conference Board Review; an advisor to SmartBrief on Workforce; and her advice has been featured in publications such as The New York Times, Forbes, U.S. News & World Report, and CFO Magazine, and online at Suicide Girls and AOL. Laurie is also recognized as one of the Top 5 career advisors by CareerBuilder and CNN. Laurie also sits on the strategic advisory board at Vestrics, a recognized leader and innovator in learning analytics and big data. She studied at Regent's College in London and holds a B.A. in Literature from Webster University in St. Louis, Mo.

Ready for Change? Conducting An Organizational Assessment
Shelly Schwane, Wipfli LLP

Thursday, October 16, 2014
1:15 pm -2:30 pm

HRCI Credits: General
Track: Strategic
Level: Basic

All organizations deal with constant change, some of it significant. Being able to assess your organization's effectiveness is a proactive strategy to help you manage the impact of change and transition on the organization itself as well as your employees. In this session, you will be introduced to the psychology of change, as well as a number of diagnostic and assessment tools and techniques to help you understand where your organization is today. Specific topics to be addressed include: Introduction to organization truisms, how to assess your organization's readiness for change, introduction to the Wipfli approach to organizational assessment and improvement (OAI), and understanding and managing organizational transitions using tools such as the core capability assessment, SBAR communication tool, and scenario planning. Understanding your organizational strengths and dealing with your vulnerabilities will allow you to better serve your customers and plan for the organization of tomorrow.

Learning Objective #1:
Review the reasons that organizations change and resist change.

Learning Objective #2:
Discover methods and tools for assessing your organization's strengths, weaknesses, and readiness for change.

Learning Objective #3:
Learn how to begin and sustain momentum in an organizational change effort.

Shelly Schwane is a consultant in Wipfli LLP's nonprofit and government practice. She shares her diverse background in data analytics, program development, and operational planning to help clients infuse viability into their missions and thrive as community leaders. Driven by a passion for social change, Shelly's goal is to strengthen her clients through fair and equitable wage structures, change management, and understanding generational differences. She also provides client trainings and presents at conferences on a variety of human resources, leadership, and organizational development topics.

Retirement Opportunities: Smart Plan Design
Michael Daley, Oppenheimer Funds
Joe DeLude, MassMutual Financial Group

Thursday, October 16, 2014
10:45 am-12:00 pm and 1:15 pm-2:30 pm

HRCI Credits: General
Track: Rewards
Level: Intermediate

Americans continue to worry about their finances. Specifically, they worry about not having saved enough for retirement and not being able to maintain the same (or a better) standard of living. More and more, they rely on their company's retirement savings plan to help them subsidize their retirement. But they need help. Your employees recognize that they need to take a more active role in their own savings but are at a loss when left to do it on their own.

Presented by Great Lakes Retirement Plan Consultants, this session will show how your companies retirement plan can be changed to help participants achieve more successful retirement outcomes. Utilizing behavioral finance, sponsors can update their plans with little to no increase in overall expenses while increasing the drivers to successful retirement outcomes.

As a Senior Retirement Consultant for OppenheimerFunds, Mike collaborates with financial professionals to help find innovative solutions to retirement plan challenges, and helps advisors grow their business to meet the investment needs of increasingly complex retirement marketplace. He directly supports financial advisors, relationship managers and consultants by sharing expert technical knowledge and translating ideas into practical, actionable strategies. What's more, because OppenheimerFunds does not offer a 401(k) platform, he can take an impartial, consultative approach to best align provider selection with customer needs. Mike leads the firm's DCIO efforts for the Upper Midwest Region.

Mr. DeLude joined MassMutual's Retirement Services Division as managing director of institutional sales. Based in Libertyville, Illinois, Mr. DeLude is responsible for working with mid- and large-market retirement plan advisors across eastern Wisconsin, Illinois and Indiana. He joins MassMutual from ADP Retirement Services where he was a top retirement plan institutional representative.

Rewarding Performance Despite Low Compensation Budgets
Richard Sperling, Sperling HR, LLC
and Neil Lappley, Lappley & Associates, Ltd.

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: General
Track: Strategic
Level: Intermediate

We hear a lot of people saying that you can't reward performance when you only have a 3% compensation budget. We disagree. This workshop highlights ten ways to reward performance despite low compensation budgets – ten ways that we have used successfully over many years. For the near to mid-term, compensation budgets will likely be about 3%. This is the result of a stable period in the economy, with modest growth, continuing significant unemployment, and low inflation creating little pressure to raise wages. Modest salary budgets create challenges to differentiate top-performers and high potential employees. At the same time, average performers – the bulk of the workforce – need to be taken care of. Companies tell us that they are striving to pay for performance. But are they succeeding? We believe there are ways that organizations can do better in delivering rewards to top performers. This workshop focuses on methods to reward top performers through salary and variable reward programs. We will provide client examples of methods that differentiate performance, illustrate good incentive program design and show methods to enhance communication of pay programs to employees.

Learning Objective #1:
You CAN design salary programs that pay for performance despite small increase budgets.

Learning Objective #2:
You CAN use incentives to reward organization performance – and even individual performance.

Learning Objective #3:
Communications matters – and you CAN communicate in ways that make your reward programs more effective.

Rich Sperling formed Sperling HR, LLC, in 2009 after 30 years in human resources and consulting. Before establishing Sperling HR, Rich was a Senior Consultant at Hay Group. Rich works with clients to build jobs, organizations, and reward programs that support and enable their business strategies and objectives. He provides expert consulting services in job evaluation, job families, roles and role relationships. Rich helps clients understand, plan, and manage spans of control. He also provides independent job evaluation reviews and dispute resolution for clients. He helps clients build the foundations for integrated performance management; career pathing; management development; succession planning; and reward strategies, architecture, and programs. Rich holds an MBA from Northwestern University and a BS from Yale University. He is a frequent author and speaker on jobs, organization, and rewards.

Neil Lappley heads a human-resources consulting practice that focuses on the development and implementation of reward and recognition programs that impact clients' results. He has worked as a compensation and human-resources consultant for over 25 years. Neil has comprehensive experience in compensation systems, including executive compensation, salary management, sales-force incentive plans, board of director compensation, market-pricing, development of compensation surveys, and performance management.

Stepping Up Your Personal Leadership Brand
John Izzo

Thursday, October 16,2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Talent
Level: Intermediate

In this workshop we will explore how you can step up and grow your personal leadership brand. Each of us has a personal brand as a leader but we are often not intentional about growing that brand. In this session, Dr. John Izzo will help us understand the secrets to a powerful personal brand including why some leaders and professional have more influence and are more admired. The session will focus on how HR professionals can both up their own personal brand while helping the leaders they coach do the same.

Based both in research and his personal experience coaching executive for twenty years at over 600 companies, you will learn:

- The Keys to Being an Admired Leader and having a strong personal brand.
- How to discover your current leadership brand.
- Learn why some leaders keep growing and how you can take steps to grow your competence.
- Discover methods to change your own leadership behavior.

Dr. John Izzo helps companies maximize their potential from the ground up. For over 20 years, Izzo has worked with thousands of leaders around the world, on employee-engagement strategies and brand transformations. Now, he shares the secrets to how purposeful leadership translates into sustainable success, with audiences everywhere.

Dr. Izzo is the former senior organizational-development consultant for Kaiser Permanente, and former Vice President of The Einstein Consulting Group, an international customer-service consultancy. He advises some of the world's most admired companies, teaches at major universities, conducts leading-edge research on workplace values, and has spoken to more than one million people around the globe. He has served on the boards of several large conservation organizations, worked with over 100 companies to create more socially responsible workplaces, and was chair of the North American Environmental Caucus at the UN Conference on Development and Sustainability in Cairo.

Spy Tactics for Human Resource Professionals-Assessing Employee Truthfulness
Matthew Kurlinski and Sofija Anderson,
Littler Mendelson, P.C

Friday, October 17, 2014
8:30 am-9:45 am and 10:00 am-11:15 am

HRCI Credits: General
Track: Accountability
Level: Basic

Human Resources professionals frequently assess truthfulness in the workplace. Making accurate and timely credibility determinations is an essential skill, but how can you be sure someone is being truthful? The task can be daunting. However, there are techniques that can make the job easier; proven tips and tricks borrowed from another profession – the professional intelligence officer. Throughout history, countries have relied on intelligence officers to develop spy networks to seek out the truth. While there are ethical, legal, and practical considerations that prevent you from using your own spy networks in the workplace, there is no reason why you cannot borrow, and learn from, some of the other tools that spy handlers around the world have used to assess truthfulness for decades. This presentation does just that – outlining tips and tactics that can help you determine whether someone is lying or telling the truth in the employment context and beyond.

Learning Objective #1:
Learn basic signs of deception, including simple clues that may indicate that someone is lying to you.

Learning Objective #2:
Develop tactics for detecting deceit when gathering information during employee interviews or other fact-gathering settings.

Learning Objective #3:
Obtain familiarity with legal and practical considerations regarding workplace use of various purported methods of detecting deception, including polygraphs, personality tests, truth serums, and hypnotism.

After working for almost ten years in the Central Intelligence Agency (the "CIA") where he was a senior operations officer, Matt Kurlinski is now an attorney for Littler, the largest global employment and labor law practice with more than 1,000 attorneys in over 60 offices worldwide. Mr. Kurlinski represents clients in state and federal courts, as well as before federal, state, and municipal administrative agencies, including the Equal Employment Opportunity Commission, the Wisconsin Equal Rights Division, and the Madison Equal Opportunities Commission. He defends employers in labor arbitrations and has handled appeals to the Wisconsin Labor and Industry Review Commission, Wisconsin Courts, and the United States Court of Appeals for the Seventh Circuit.

Sofija Anderson represents employers in litigation of labor and employment-related disputes in state and federal courts and before administrative agencies, as well as in the arbitral forum. Experienced in both single plaintiff matters and class actions, her practice includes defending claims of: employment discrimination, unlawful harassment, retaliation/whistleblowing, wrongful discharge/violation of public policy, breach of contract, interference with prospective economic/business advantage, unfair business practices, wage and hour violations, fraud, defamation, and privacy violations. Sofija also has extensive experience obtaining workplace violence injunctions on behalf of employers and affected employees. In addition to representing clients in mediation and arbitration, Sofija litigates claims arising under federal and state law. Aside from litigation, Sofija assists employers of all sizes with customizing and implementing state-of-the-art employment policies and procedures. She also offers compliance counseling and advises employers on a variety of employment and labor-related issues, ranging from employee on-boarding, performance management/discipline, accommodation, contract negotiations and plant closures. She also offers training seminars on a variety of topics related to human resources and employment law.

The ABC's of Background Checks
Bill Wons, Wons Background Investigations LLC

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: General
Track: Talent
Level: Basic

All organizations strive to reduce risk, hire the right employees, and retain their best employees. Employment background checks are a critical tool that will help you meet these goals. This presentation will provide an overview of the Criminal Justice System as it relates to background checks. Each source of background check information (both from government entities and private databases) will be discussed in terms of their respective strengths and weaknesses. This information can help organizations decide what level of background checks is best for them. The program will end with an overview of the Fair Credit Reporting Act (which covers the use of background checks for employment purposes) including what steps must be taken to stay in compliance with the FCRA.

Learning Objective #1:
Gain knowledge of the Criminal Justice System as it relates to background checks as well as other sources of criminal records information.

Learning Objective #2:
Will help organizations stay compliant with the Fair Credit Reporting Act.

Learning Objective #3:
Participants will become better educated "consumers" when looking at implementing a background check program, improving their current program, and/or working with background screening vendors.

Bill Wons is the owner of Wons Background Investigations LLC. He earned his Bachelor's degree in Criminal Justice from the University of Wisconsin-Platteville and an M.B.A. from the University of Wisconsin-Oshkosh. Bill has over 20 years experience in the background investigation field including 13 years as the owner of Wons Background Investigations LLC. Currently his company provides background screening services for over 450 companies nationwide.

The Art and Science of Managing and Motivating Millennials
Deb Wood, Midwest EAP Solutions

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Talent
Level: Basic

Millennials (20-30 years old) comprise 19% of the workforce and that number will keep growing. This generation has grown up in a world that promoted participation, family bonds, technology and relationships. Their values and the way they define their goals around work can be very different from the other generations—which has caused some misunderstandings within organizations. However, their talents and approaches to tasks can be invaluable. This session will explore what Millennials want, how they work, what motivates them and how they can positively impact the organization—and how managers can use that knowledge to both achieve organizational needs and goals, and develop the next generation of leaders.

Learning Objective #1:
Understand the characteristics and motivations of Millennials.

Learning Objective #2:
Develop strategies to recruit and manage them, and develop and optimize their skills.

Learning Objective #3:
Learn how to promote intergenerational cooperation and respect as Millennials become a greater presence in the workplace.

Deb has worked in the employee assistance field for over 25 years. As a senior consultant for Workplace Behavioral Solutions, Inc. and its Midwest EAP Solutions and Physician Wellness Services divisions, she does counseling, speaking, and training and development. She has also taught at Minnesota State University and has worked with a wide variety of organizations including schools and health systems. Deb specializes in the areas of team building, stress management, workplace violence, and also does critical incident stress debriefings. Additionally, she is currently working in the areas of workforce reduction and bullying in the workplace. Deb is a Certified Employee Assistance Professional and has her PhD in counseling from Capella University.

The Art of Feedback: Advanced Tips & Techniques
Laura V. Page, Page Management Consulting

Friday, October 17, 2014
8:30 am-9:45 am

HRCI Credits: General
Track: Talent
Level: Advanced

Giving feedback is one of the most difficult communication challenges we face as leaders and team members. Even after years of experience coaching our direct reports and even peers, these conversations can still be very difficult for us. In this applied skills workshop we'll take a deep dive into process and best practices. Our focus will be on informal coaching and not on discipline or written performance reviews. After reviewing a detailed "map" of a powerful feedback approach, we’ll explore multiple tips and techniques for turning a "talking to" into a genuine conversation that is far more likely to motivate change. We’ll share techniques for what to do if the person being coached becomes defensive, and we'll learn some techniques for avoiding becoming defensive ourselves. Multiple cases and video clip analysis will be included.

Learning Objective #1:
Explore multiple advanced listening and communication techniques that are especially helpful during coaching conversations.

Learning Objective #2:
Increase self-awareness of our patterns of reactions to difficult communication and review how to handle defensiveness in ourselves and others.

Learning Objective #3:
Improve our ability to carefully plan and deliver feedback messages.

Laura V. Page is a highly experienced management consultant who has assisted hundreds of profit and nonprofit organizations for over two decades on issues of strategic planning, communication, conflict resolution, team building and leadership development. She is a frequent seminar instructor, meeting facilitator and public speaker. In addition to her client coaching and consulting, she is a regular ad hoc instructor for both the University of Wisconsin-Madison and Milwaukee's continuing education divisions. Laura's background includes the position of Manager of Business Counseling for UW-Madison's Small Business Development Center, and management consultant in Chicago with Ernst & Young. She has held department head positions in four organizations and worked as an HR assistant for a learning film distribution company. Laura's formal education includes a Master's degree in Management Development from UW- Madison, and a Master's in Marketing, Certificate in Administration, and Bachelor's in Philosophy from Northwestern University. Laura is a member, past Board Director and service award recipient of the American Society For Training and Development, Southcentral Wisconsin chapter. She has been a Board Director of Wisconsin Women Entrepreneurs and is a member of the Madison Area Business Consultants and the Greater Madison Area Society for Human Resource Management (SHRM).

The Black Hole of Adoption: Why HR Tech Implementations Fail
Dwane Lay, Dovetail Software

Thursday, October 16, 2014
10:45 am-12:00 pm

HRCI Credits: General
Track: Accountability
Level: Basic

With the great expense that is poured into developing and acquiring technology, HR departments have repeatedly found themselves bemoaning poor adoption and usage numbers. More vexing still are the stories of other organizations that have implemented identical platforms, but with much different outcomes. The message, then, is that adoption and implementation is far less about the technology than it is the people, the process, and understanding of your own organization. In this session, we will review the most common reasons implementations fail, review the success story at Diamond B Construction, and discuss simple steps technology owners can take to support early adoption and long term usage.

Learning Objective #1:
Review the basics of a successful implementation, including selection, change management, training requirements, project management and ownership.

Learning Objective #2:
Share tools to assist technology owners in organizing and tracking their implementation, such as FMEA, Stakeholder Analysis and RACI.

Learning Objective #3:
Create a roadmap of long term development/implementation success that supports ongoing usage and improvements.

Dwane Lay is author of the book Lean HR: Introducing Process Excellence to Your Practice. He has spent over a decade as an HR practitioner, following an early career in operations, IT and quality. This background has given him a unique perspective on the processes that make up human resources, and the potential for improvements in efficiency and effectiveness. He is recognized as a leading authority on the application of Lean tools and techniques in Human Resources, as well as having a wealth of experience in applying business technology to improve HR processes. A well-known presence on the HR social media landscape, he can be found on a variety of platforms, including Twitter (@DwaneLay), Facebook (facebook.com/dwanelay) and LinkedIn (linkedin.com/in/dwanelay). He also writes on human resources, process design and, occasionally, comic books and moves at www.LeanHRBlog.com Dwane holds an MBA from Lindenwood University, as well as having earned a Six Sigma Black Belt and is a certified Senior Professional of Human Resources with HCRI. He also serves as the Head of HR Process Design for Dovetail Software, a leading provider of HR case management solutions.

The Future Workforce: Talent Management in 2020
Sarah White, Accelir

Thursday, October 16,2014
3:30 pm-4:45pm

HRCI Credits: General
Track: Talent
Level: Intermediate

In 2014, approximately 50 percent of the world's working population will have been born after 1980 (known as gen Y or millennials); this group expects to be treated in ways unfamiliar to older generations - but that doesn't mean an organization can't prepare strategically to the changes and expectation while maintaining their corporate culture. Learning strategies to leverage skills to excel with them in our workforce will set high performing organizations apart.

Learning Objective #1:
Gain insight into the future generation of talent and what that means in a business context.

Learning Objective #2:
Acquire best practices on how to establish the business value of talent management strategies and execution.

Learning Objective #3:
Discover how a unified approach to recruiting and talent management demonstrates immediate business value to executives.

Sarah White, is the founder and Principal Advisor at Accelir - a consulting firm working with companies wanting to accelerate growth through innovative talent acquisition, technology and market strategies. Prior to launching her firm, she served in leadership roles in corporate recruiting, business strategy consulting, and as a C Level Executive at a SaaS technology. With more than a decade dedicated to researching, developing and executing strategies related to growth and hiring, Sarah is a sought after writer, speaker, trainer and consultant. She has been featured in national media such as Huffington Post, Fast Company, NBC News, US World Report, Bloomberg, Wall Street Journal, USA Today, FOX, ABC and has spoken globally at events like SXSW, Mashable, HR Tech Conference, HR Tech Europe, iRecruit Global, SHRM, TRU, etc on brand strategies, technology trends and talent related topics. Sarah White is also the founder of HRTechBlog, co founder of the WomenofHR blog, a GigaOm.com contributing analyst, Candidate Experience Awards council member and advisor to a number of start ups.

The Impact of Oral Health on Medical Plan Costs
Fred Eichmiller, Delta Dental of Wisconsin

Friday, October 17, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Metrics
Level: Basic

Periodontal (gum) disease is a chronic infection that can be treated and controlled, but not cured. The US Center for Disease Control and Prevention estimates that almost half of adult Americans over 30 years in age have some level of periodontal disease. A study released last year by a national health insurance company indicates that untreated periodontal disease increases medical claim costs by, on average, $1000 per patient per year, compared to patients who's periodontal disease is properly treated. This presentation will discuss the cause and treatments for periodontal disease, and how patients with this chronic condition can be educated and engaged to obtain the care they need.

Learning Objective #1:
Understand the impact of periodontal disease on their employees and families.

Learning Objective #2:
Estimate the impact periodontal disease has on medical plan costs.

Learning Objective #3:
Identify strategies available within employee benefit plans to increase the treatment of periodontal disease, with the resulting reduction in costs in the medical plan.

Dr. Fred Eichmiller is Vice President and Dental Science Officer at Delta Dental of Wisconsin. He is responsible for monitoring and participating in dental research, and incorporating findings from that research into Delta Dental's operations. Dr. Eichmiller has 20 years of dental research experience with the American Dental Association, most recently as the managing director of the ADA Health Foundation's Paffenbarger Research Center. Dr. Eichmiller is a general dentist and has more than 20 years of teaching experience at dental schools across the country. Dr. Eichmiller has a DDS degree form the University of Minnesota - Twin Cities and a BSME in mechanical engineering from the University of Minnesota Twin Cities.

The New SHRM Certification
Kari Strobel, PHD, Director, HR Competencies
Society for Human Resource Management

Thursday, October 16, 2014
6:30 am-7:30 am

HRCI Credits: None
Track: Rewards
Level: Basic

This session will provide an overview of SHRM's new competency-based certification.

SHRM is developing a new HR Certification program based on the competencies required to be an effective HR professional. This certification is the culmination of over three years of research, and based on the SHRM HR Competency Model, which was validated by more than 30,000 HR professionals around the world. Come and learn about the new certification exam that will assess both behavioral competencies and HR technical expertise and knowledge. This session will give you an overview of what you can expect as well as the opportunity to ask questions.

In her role as Director, HR Competencies for the Society for Human Resource Management (SHRM), Kari Strobel is responsible for overseeing key initiatives around professionalism and competencies to include the assessment and implementation of SHRM's HR Competency Model, and setting the research agenda for developing additional competency-based talent management tools.
Prior to joining SHRM in 2013, Dr. Strobel worked at the Department of Defense where she was responsible for leading the development, assessment, and implementation of competencies for the total force. Dr. Strobel has also been responsible for managing organizational development projects for the Chief of Naval Operations, Surface Warfare Enterprise and the Naval Mine and Anti-Submarine Warfare Command.
With over 30 journal articles, technical reports, and national and international conference presentations, to include published works in *Journal of Applied Psychology* and *Human Performance, Situation Awareness and Automation*, Dr. Strobel has received national recognition for her contributions to the field. She was the first recipient of the American Psychological Association Division 19 (Military Psychology) Research Award, and received Honorable Mention from the Virginia Academy of Science for her team performance research.
As a consultant she has worked with Hewlett Packard, Motorola, Royal Dutch Shell, Deutche Bank, National Aeronautics and Space Administration, The United States Army, and the State of Virginia's Peninsula Aids Foundation.
Dr. Strobel received her Doctor of Philosophy degree in Industrial-Organizational Psychology from Old Dominion University.

Tools to Assist Employees in Achieving Work/Life Balance
Clifton Barber, University of Wisconsin – Madison, Claire Culbertson, Greater WI Agency on Aging Resources, and Kathy Talaat, Community Living Alliance

Thursday, October 16, 2014
6:30 am-7:30 am

HRCI Credits: General
Track: Rewards
Level: Basic

Sixty percent of the workforce has caregiving responsibilities for aging family members, and struggle to maintain work/life balance. As the population ages at unprecedented rates, the demand for informal care will only increase. The cost to U.S. employers from lost productivity of employees who are caregivers is estimated to be as high $34 billion annually. These costs are attributed to replacing employees, workday interruptions, absenteeism and shifts from full-time to part-time work. This session will address these trends, cost-effective solutions to address the growing population of employed caregivers, and how to minimize the negative financial impact on your organization. Participants will gain access to tools developed by UW Cooperative Extension to assist employers with these challenges, as well as an abundance of local community resources.

Learning Objective #1:
Identify the impact of caregiving on both employees and employers.

Learning Objective #2:
Provide examples of the kind of caregiving situations typically experienced by employees who struggle to simultaneously balance work and elder care.

Learning Objective #3:
Access a variety of caregiver resources that will enable employers to foster a workplace environment that is more supportive of working caregivers.

Clif Barber completed a PhD at Penn State University, and has been a faculty member at both Colorado State University and Washington State University. He is currently a Professor of Human Development and Family Studies at the University of Wisconsin-Madison, and also serves as a state specialist on aging for UW Cooperative Extension. Prof. Barber's leadership has involved a number of outreach projects focused on older persons and their families. He currently co-chairs the team of county Extension educators that developed the Employed Family Caregiver Survey, which is hosted on the national eXtension website. The Survey is being used to increase employers' awareness of employees who struggle to balance work and elder care, and to encourage the development of policies, benefits, and services that are supportive of their needs.

For the past 14 years, Claire has worked to develop and promote programs that assist family caregivers. Claire currently works at the Greater Wisconsin Agency on Aging Resources, where she provides training and support to Wisconsin Caregiver Coalitions. Claire also trains professionals in communities who wish to start Share The Care Stations – a place where people in need of caregiver support can receive information and assistance to organize offers of support into caregiver teams. For 9 years, Claire was employed at the Area Agency on Aging of Dane County as Caregiver Program Manager, the central hub for all Dane County's family caregiving activities, also chairing the Dane County Caregiver Alliance. Claire received her Master's Degree in Public Health, Health Promotion Division, from San Diego State University.

Kathy Talaat is the Director of Human Resources for Community Living Alliance, Madison, WI. Her previous positions include Vice President of Education with Junior Achievement of Dallas, TX, Senior Planner and Organizational Development Specialist with the North Central Texas Council of Governments/Workforce Development Board, and department chair with the Baltimore County Public Schools. In addition to a master's degree in liberal arts from Johns Hopkins University, Kathy also has a certification in human resources practices from Cornell University, certification as a Workforce Development Professional, and is an internationally Registered Corporate Coach. Kathy has presented at various local and regional conferences, served on the National Board of Examiners for the Workforce Excellence Network, and is currently an adjunct faculty member with the College of Business and Management of Cardinal Stritch University.

Transitioning from HR Leader to Chief People Officer
Jack Smalley, Express Employment Professionals

Thursday, October 16, 2014
1:15 pm-2:30 pm and 3:30 pm-4:45 pm

HRCI Credits: Business
Track: Strategic
Level: Advanced

Though there are more than 100 competencies and behaviors defining Human Resource leadership there are five that the most successful Chief People Officers (CPOs) must clearly master. CEOs are increasingly turning to their Chief People Officers as their top trusted advisor and assigning them to significant and strategic roles in steering organizations out of the most turbulent times thus protecting the delicate relationships and retention of employees, investors and customers. By applying the five key competencies and using relevant, current and accurately forecasting business data CPOs are developing the business strategy to change the direction of today's most successful organizations.

Learning Objective #1:
This session is for every HR professional seeking to become indispensable to their organization while being a vital part of the succession plan to join the "C suite".

Learning Objective #2:
To assist HR professionals to become a key strategic partner in identifying, developing and driving vision, culture and mission into reality.

Learning Objective #3:
For HR professionals to lead their organizations to the elite level by embracing the five key competencies of the most successful Chief People Officers: accountability, ownership, Influence, consistency and integrity

Jack Smalley, SPHR serves as Director of Human Resources Learning & Development for Express Employment Professionals international headquarters. He provides leadership, human resource training and consulting for more than 650 Express offices and their clients in the U.S. and Canada. Jack offers clients extensive leadership guidance from a progressive career as a Human Resource executive. For the last thirty years, Jack has devoted his career to the field of leadership and human resources. His experience includes executive-level management in a number of different industries such as oil, chemical, and packaging with an emphasis in manufacturing, engineering, sales, logistics, and corporate management. He is a sought after national keynote speaker. Since 2010 Jack has had over 500 speaking engagements, including numerous state and local SHRM (Human Resources) conferences, totaling more than 50,000 attendees. Also, Jack has been a regular speaker at the National SHRM Conferences and will be conducting two mega sessions at the 2014 National SHRM Conference in Orlando. Jack is included in SHRM's very small but elite group of "most preferred speakers". Jack is a member of the Society of Human Resource Management and holds the designation of Senior Professional in Human Resources (SPHR).

Using Social Media for Hiring, Discipline and Discharge Decisions
Jennifer Walther, Mawicke & Goisman, S.C.

Friday, October 17, 2014
10:00 am-11:15 am

HRCI Credits: General
Track: Talent
Level: Basic

Advances in technology have changed the way in which we communicate. Employees and employers actively use social networking sites such as Facebook, LinkedIn, and Twitter in ways which blur the lines between business and personal communication. This learning session will discuss: • How social networking sites are being used by employees and employers; • How hiring, discipline and discharge decisions are influenced by social media; • What employees can and cannot do when using social media; • The provisions of a new Wisconsin law dictating how employers can use social media when making employment decisions; • Potential liabilities faced by employers who use social media sites; and • Best practices for reducing exposure to legal liability for such employment decisions.

Jennifer S. Walther is a shareholder with Mawicke & Goisman, S.C. in Milwaukee. She has been exclusively representing employers in labor and employment matters since 1990. Ms. Walther defends employers in employment litigation in federal and state courts, and administrative agency proceedings. Ms. Walther also regularly counsels employers on all aspects of the employment relationship, including issues related to discrimination, harassment, disabilities, wage and hour, worker's and unemployment compensation, employment contracts, employee handbooks, hiring, discipline and discharge, reductions in force, drug testing, FMLA issues, and ADA compliance. Ms. Walther received her B.A. degree with honors from the University of Wisconsin in Madison in 1986 and her J.D. degree, cum laude, from the Georgetown University Law Center in 1990. Ms. Walther frequently conducts seminars and training sessions for various organizations, on topics such as sexual harassment, discipline and discharge, and leave administration. She is also the author of numerous articles on current employment issues.

What will the Workforce in 2014 and Beyond Look Like?
Sandy Mazur, Spherion Staffing Services

Thursday, October 16, 2014
1:15 pm-2:30 pm

HRCI Credits: General
Track: Talent
Level: Basic

Spherion has been selected to present a number of HR related topics to SHRM of Madison over the past few years. In 1997, Spherion conducted its first Emerging Workforce Study, in partnership with Harris Interactive and set in motion 15 years and counting of in-depth, groundbreaking research about the U.S. workplace. It marked the birth of a revolutionary way of tracking and understanding workers and the resulting implications for those who employ them. We have interviewed more than 200,000 workers and companies and thereby helping organizations make strategic HR decisions. What will the workplace look like in the next few years, or even decades? How might workers' perceptions and expectations about the workplace evolve in the future? There are several broad sweeping changes on the horizon that will likely impact the worker of the future, and those who employ them.

Learning Objective #1:
How will technology and new collaborative methods affect interpersonal relationships and the social aspect of the workplace?

Learning Objective #2:
How will HR and business leaders recruit, attract and retain five different generations in the workplace? How will changes in the physical office space impact productivity?

Learning Objective #3:
What's driving worker job satisfaction? Why social media is proving to be a strong platform for keeping employees engaged and productive.

Sandy Mazur is a division president of franchise and license operations. Mazur is responsible for the strategic leadership and support of an extensive base of franchise offices and licensees, as well as for expanding the franchise program into new U.S. markets. Headquartered in Atlanta, Georgia, We are a major national recruiting and staffing company actively pursuing market expansion through franchising. Prior to this post, Mazur was responsible for product development and end-to-end product life cycle management for an extensive portfolio of recruiting and staffing services. These include specialty offerings supporting customer service call centers, non-clinical healthcare and educational institutions, and innovative Web-based tools. A seasoned executive with broad-based experience in the staffing industry and a keen understanding of the U.S. workforce and the issues that drive performance, Mazur is a compelling and articulate speaker. She has shared the findings and implications of the Spherion Emerging Workforce® Study with numerous business groups. Conducted by Harris Interactive on behalf of Spherion and reflecting 15 years of research, the Study provides a comprehensive look at changes in the American workforce in the context of ongoing social and economic events.

Work Happy
Dawn Kaiser, The Village Business Institute

Thursday, October 16, 2014
3:30 pm-4:45 pm

HRCI Credits: General
Track: Rewards
Level: Intermediate

Employee engagement is one of the primary concerns and challenges facing today's HR professionals. Do you have employees who are happy when they come to work or when they leave work? In this session we will review techniques you can use to create a culture of happiness that encourages engagement & promotes employee retention.

Learning Objective #1:
Identifying key elements to being engaged at work.

Learning Objective #2:
Exploring motivation from the inside out.

Learning Objective #3:
Discovering how to cultivate happiness to maximize potential & performance.

Dawn Kaiser lives her passion to energize, encourage and equip individuals to live awesome. She is an inspirational educator, writer, blogger, teacher, leader and positive-thinker extraordinaire. Dawn draws on more than twelve years of experience in the Human Resource/Organizational Development field and has a Bachelor's of Business Administration and a Master of Education. She is also a certified HR Professional. Dawn specializes in communication, leadership, high performance teams and personal development. Dawn also enjoys unleashing hope and joy in her community and around the world through her career and volunteer opportunities.