



# Conference Agenda

## TRACK 2:

Who Wants To Be Millionaire, Or At Least A Winning Benefits Expert?

A question and answer session in a style similar to that of the TV show "Who Wants to be a Millionaire". Questions are related to current benefits topics in various areas including health care, retirement, etc. Fabulous prizes will be awarded to contestants who answer the most questions correctly.

### Speakers:

**Art Dickerson**, Senior Consultant, William M. Mercer, Inc.  
**Julie Accardo**, Consultant, William M. Mercer, Inc.  
**Lisa Covell**, Consulting Analyst, William M. Mercer, Inc.  
**Laura Pinkall**, Consultant, William M. Mercer, Inc.

## Surf City — SWBA!

6:00 p.m. - 9:30 p.m.

Beach Party at Moody Gardens

Sponsored by: **John L. Wortham & Son**

(Charter buses depart from hotel at 6:00 p.m. and from Moody Gardens at 9:00 p.m.)

## Sponsor Reception

9:30 p.m. - 11:00 p.m.

San Luis Club Room

Sponsored by: **Past Presidents Club**

## Tuesday, May 22, 2001

## Continental Breakfast

8:00 a.m. - 9:00 a.m.

Sponsored by: **HCC Employee Benefits Group**

## GENERAL SESSION IV

9:00 a.m. - 10:15 a.m.

Outsourcing — Making it Work

The purpose of this session will be to explore the practical issues related to the identification, selection, implementation and management of outsourcing relationships. The session will focus on the following key areas:

- Understanding current marketplace trends
- Identifying potential vendors
- Defining the scope of services required
- Negotiating competitive agreements
- Establishing performance expectations
- Managing vendors for performance
- Considering future opportunities

Special emphasis will be placed on discussing these topics from an insider's viewpoint. Examples will be provided by companies with large outsourcing relationships based on their own experiences.

### Speakers:

**Mark Greenway**, Vice President of Human Resources, J.B. Hunt Transport (Moderator)  
**Scott Gildner**, President, Gildner & Associates, Inc.  
**Ellen Collier**, Manager of Benefits, Eaton Corporation  
**Kathleen Veal**, Manager, Benefit Service Delivery, Duke Energy

## Break

10:15 a.m. - 10:30 a.m.

Sponsored by: **The Vanguard Group**

## GENERAL SESSION V

10:30 a.m. - 11:45 a.m.

Ultimate Self-Service

We have all heard about Self-Service (SS). But what is it and what can it do for you? What is your return on investment? How do you go about implementing it? Is it worth the cost? Learn the ins and outs of implementing SS and the extraordinary results achieved by The Associates & J. B. Hunt Transports in both manager SS and employee SS. They will share their insights on how they used SS as a catalyst to turn their HR and Benefits Departments from a cost center into a profit center by completely reengineering their HR processes and systems. Additionally, they will share how and why they made the difficult decision to outsource the implementation.

### Speakers:

**Donna Manchester**, Vice President, CDG Associates  
**Kathy Meyer**, Principal, KM Consulting Group  
**Mark Greenway**, Vice President of Human Resources, J.B. Hunt Transport

## LUNCHEON KEYNOTE SESSION

11:45 a.m. - 1:15 p.m.

Benefits and the future employer role: designer and sponsor or payroll deduction processor?

Sponsored by: **Zurich US**

National tax and employee benefits policy will be dominated for at least the next two years by advocates of lower tax rates, individual choice and a smaller role for job based employee benefits. Mr. Salisbury will first provide data snapshots from recent EBRI studies on future retirement asset and distribution growth for those born in 1964 and before, current behavior of 401k plan participants, the status of health insurance provision and the prospects for defined contribution health benefits. He will provide an assessment of the future of job-based benefits should policies now advocated by the President and Congressional leadership become law.

### Speaker:

**Dallas Salisbury**, President & CEO, EBRI

## BREAKOUT SESSION III

1:15 p.m. - 2:15 p.m.

## TRACK 1:

Retirement Plan Outsourcing Moves Downstream — A Case Study

A trend to watch in retirement plan management is the movement toward outsourcing, especially for mid-size companies with 500 – 5000 employees. In this session, you will learn about the market conditions that seem to be driving the outsourcing trend, principles and methodologies that help make sense of the decision to outsource your retirement plans, and the financial impact associated with that decision. A case study of an El Paso hospital's experience with retirement plan outsourcing will be shared, including some of the pitfalls encountered along the way, the internal and external costs, strategies that worked well, what went wrong, and what to avoid.

### Speakers:

**Tom Pohlmann**, Vice President, CIGNA Retirement & Investment Services (Moderator)  
**Mark Trieb**, Principal, Milliman & Robertson, Inc.  
**Carla Barton**, Human Resources Manager, Shannon Health System

## TRACK 2:

Health Plan Update

Soaring health plan costs, newly released federal and state health claims administration, Summary Plan Descriptions, HIPAA nondiscrimination, privacy, security, administrative simplification, electronic data interchange, cafeteria plans, COBRA, qualified medical child support order, and other regulations, new reporting requirements, Federal and State Patient Bill of Rights and other health care reform proposals, vendor mergers, and a plethora of recent court decisions present a significant challenge for health plan sponsors and administrators in the 2001-2002 plan year. With these and other challenges making health plan sponsorship and administration increasingly risky business, health plan sponsors and vendors must develop an appropriate strategy for negotiating vendor agreements and updating health plan terms, communications and processes. Cynthia Marcotte Stamer will update you on the latest legal developments affecting your health plans and provide tips for coping with new health plan responsibilities and liabilities.

### Speakers:

**Todd Leveridge**, Executive Vice President, Complink (Moderator)  
**Cynthia Marcotte Stamer**, Partner, Locke Liddell & Sapp, LLP

## Adjournment

2:15 p.m.

Complimentary Shuttle departs for Houston airports

2:45 p.m.

## ADDITIONAL SPONSORS

- AIM Management
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- Al
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- B:
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