



HR Outsourcing Forum Spring 2019 Meeting

Convene Rosslyn, VA

1201 Wilson Boulevard, Arlington, VA 22209 | 888-730-7307

convene.com

Wednesday, May 8, 2019

11:30 a.m. – 12 p.m. | Arrival, pick up materials

29th Floor, The Gallery

12 – 12:30 p.m. | Welcome, Opening Remarks, and Luncheon

29th Floor, Observation Hub North (Meeting Room), The Gallery (food and beverages)

12:30 – 2 p.m. | Introductions and Facilitated Discussion

Attendees will introduce themselves and highlight their answers to the following three questions:

1. *What is the biggest administrative challenge you are currently facing?*
2. *What is the top conversation you're hoping to have with other members while you're attending the Forum meeting?*
3. *Which of your programs, if any, are currently under review and why?*

NOTE: All attendees will receive introduction slides and outsourcing profiles on or before May 3, 2019 for reading prior to the Forum.

2 – 2:15 p.m. | 15-minute break

2:15 – 3:15 p.m. | Managing Conversions to a New Administration Vendor – Lessons Learned

Kevin Kaiser, Director-Benefit Services – **Campbell Soup Company**

Mark Low, Vice President, Health & Welfare – **Omnicom Group**

Brett Barthelmess, Senior Consultant – **Hager Strategic**

HROF members Kevin Kaiser (DB, DC and H&W) and Mark Low (H&W) have recently managed conversions to new administrative vendors. Their approach to these implementation projects included involvement of various project management and oversight roles in order to achieve a successful transition. They will share lessons learned from their experiences and highlight the areas that require the most focus and scrutiny (both proactively and reactively) from a project management perspective.

3:15 – 5 p.m. | Market Update

Michael Hager, Principal – **Hager Strategic**

In this session, members are brought up to date on important events and emerging trends in the HR/Benefits outsourcing market. This session helps members stay abreast of issues that could impact their service delivery.

6 – 8:30 p.m. | Reception & Dinner at Il Canale
1065 31st St., NW, Washington, DC 20007 | 202-337-4444



Attendees are invited for dinner, which opens with a reception and provides the opportunity for HROF members to network with fellow attendees. Il Canale is conveniently located in Georgetown.

If you are unable to attend the dinner, please advise Amy Nostrand by Friday, May 3, 2019.

Thursday, May 9, 2019

8:30 – 9 a.m. | Continental Breakfast

29th Floor, Observation Hub North (Meeting Room), The Gallery (food and beverages)

9 – 10 a.m. | Fidelity's Health Solutions – New Offerings and Future Vision

Thomas Klonecki, Head of Health & Welfare, Fidelity Workspace Services – Fidelity Investments

10 – 10:15 a.m. | 15-minute break

10:15 – 11:15 a.m. | Personalized Health Advocacy Solutions: Client Case Study 1 – Quantum Health

Stephanie Capaccio, Director, Associate Relations & Benefits – Wawa

Kate Donnelly, Senior Consultant – Hager Strategic

As a follow up to our Fall 2018 session on the evolving Advocacy services market, we have included two sessions in which members will hear directly from clients of the leading health advocacy providers. During this session, Stephanie will address Wawa's experience implementing Quantum Health, including how Quantum Health's model shifts certain responsibilities traditionally held by carriers and H&W administration vendors, how Quantum Health has been received by their employees, and the impact Quantum Health's services are having on Wawa's other health and wellbeing initiatives.

11: 15 a.m. – 12:15 p.m. | Working with and Managing Independent Contractors

Joel Flesher, Sr. Director, Business Development & Strategic Partnerships – WorkMarket, an ADP Company

Andri Sujono, Senior Consultant – Hager Strategic

More and more, businesses are incorporating freelancers and contractors into their growth strategies and have begun investing in tools and technologies that are empowering them to work better, faster and smarter. Large firms estimate that 30% of their procurement spend goes toward contingent workers. According to a [ManpowerGroup](#) survey conducted in 2017, which examined the growth of various non-traditional work arrangements, including part-time, contingent, contract, temporary, freelance, flex and others, 94% of workers are open to these types of non-traditional forms of work.

During this session, Joel will give a brief overview of WorkMarket, one of the leading enterprise software platforms that enables companies to efficiently and compliantly organize, manage and pay their contingent workforce.

12:15 – 1 p.m. | Luncheon



1 – 2 p.m. | Personalized Health Advocacy Solutions: Client Case Study 2 – Accolade

Andrew Rosa, Vice President, Customer Partnerships – Accolade, Inc.

Kate Donnelly, Senior Consultant – Hager Strategic

During this second session on Health Advocacy, Andy Rosa, formerly with AmeriGas (and now with Accolade), will address AmeriGas' experience implementing Accolade's health advocacy solution.

2 – 2:15 p.m. | 15-minute break

2:15 – 2:45 p.m. | What are Health & Welfare Administration Providers Doing to Engage Participants to More Effectively Use Their Health Benefits?

Michael Hager, Principal – Hager Strategic

With increasingly more effective health care “usage” providers appearing on the landscape, this session will share how the H&W administration providers are integrating these products into their solutions to better engage participants to more effectively use their health care benefits.

2:45 – 3 p.m. | Closing Comments and Adjourn

Michael Hager, Principal – Hager Strategic

Parting question, “What vendor performance standard(s) do HR Outsourcing members view as the most important to measure?”

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