



## HR Outsourcing Forum Spring 2025 Meeting

### convene

1201 Wilson Boulevard, Arlington, VA 22209  
29<sup>th</sup> Floor Observation Hub North

#### Day 1 – Wednesday, June 4, 2025

**2:30 – 2:45 p.m. | Arrival and pick up materials**  
Outside Observation Hub North

**2:45 – 5 p.m. | Market Update**  
Observation Hub North  
*Michael Hager, Managing Director, Alterity Group, LLC*

The Market Update, provided by Mike Hager, addresses the latest news about providers in the HR, Benefits and Payroll outsourcing market. In addition, Mike will highlight latest trends in the HR/Benefits administration market, discuss potential reasons behind these trends, and suggest key areas to continue to watch. Attendees regularly identify this session as a “must see” session that blows away industry updates provided by other organizations.

**6 – 8:30 p.m. | Reception-Dinner at [L'Avant-Garde](#)**  
**2915 M Street, NW, Washington, DC 20007 (between 29<sup>th</sup> and 30<sup>th</sup> Streets, NW)**

L'Avant-Garde is an elegant French restaurant in the heart of Georgetown that opened in December 2022. The goal of this modern brasserie is to appear and function as though it were plucked from the streets of Paris. Please join us for an evening of networking, fine wines, and delicious food!

L'AVANT-GARDE

#### Day 2 – Thursday, June 5, 2025

**8:30 – 9 a.m. EDT | Continental Breakfast**  
Outside Observation Hub North

**9 – 10 a.m. | Trends in Employee Engagement**  
Observation Hub North  
*Kate Donnelly, Vice President, Alterity Group, LLC*

Plan sponsors have adopted new and engaging ways to present information about their benefits, including non-authenticated benefits microsites, which are accessible to a broad audience including current employees, family members, and job seekers.

Kate Donnelly will co-present with an HROF member company to share a case study and results in recent benefits engagement initiatives.

**10 – 10:15 a.m. | Break**



**10:15 a.m. – 12 p.m. | Commissions from Voluntary Benefits**

***Jeanne Bell, Vice President, Alterity Group, LLC***

Plan sponsors often use carrier commissions from fully insured and voluntary benefits to offset employee benefit expenses. As more companies institute voluntary benefits there can be a substantial amount of commission revenue available. Not only do we see a rise in the plan sponsor's use of commission income but there is also an increased focus on the use of carrier credits to offset administration fees.

Subject matter experts will join in a discussion addressing the approved use of commissions and credits and what companies need to do to be compliant with ERISA laws.

**12 – 12:45 p.m. | Luncheon**

**12:45 – 1:45 p.m. | A Digital Approach to Benefits and Total Rewards Engagement**

***Andri Sujono, Vice President and Brett Barthelmess, Vice President, Alterity Group, LLC***

How do employers encourage employee engagement and utilization of their benefit programs and total rewards?

Join us for an insightful session where Forum members share how they've leveraged digital solutions to boost employee engagement and interaction with their benefits and total rewards, both domestically and globally. They will provide an overview of their solution, discuss what makes a good engagement experience, share lessons learned, and offer their perspective on how they see this technology evolving.

This session will present practical, real-life approaches to employee benefits and total rewards engagement.

**1:45 – 2 p.m. | Closing Comments**

***Michael Hager, Managing Director, Alterity Group, LLC***