

TOOLS FOR BUILDING A HEALTHY WORKPLACE



Missouri College & University Professional Association – HR (MCUPA-HR) 2011 Fall Conference - October 20-21, 2011 Country Club Hotel & Spa ~ Lake Ozark, Missouri

Thursday, October 20, 2011

- 9:30 a.m. Registration
- 10:00 a.m. Welcome and Introductions
- 10:15 a.m. – 11:45 a.m. **TOOL ONE:** Your Survival Guide to the IRS' Higher Ed 403(b) Compliance Check
Linda Segal-Blinn, ING & Daniel Gardner, IRS
- Noon - 1:00 p.m. Lunch (Sponsored by: National Cooperative Rx)
- 1:15 p.m. – 2:45 p.m. **TOOL TWO:** The Value of a Healthy Culture: Achieving Results via a Healthy Campus Strategy
Ruth Donahue & Penny Finch, Sibson Consulting, A Division of Segal
- 2:45 p.m. – 3:15 p.m. Break (Sponsored by: Aetna, Inc.)
Exhibit Hall Open
- 3:15 p.m. – 4:45 p.m. **TOOL THREE:** Healthcare Reform – What's On The Horizon?
Lisa Collins Carlson, Gallagher Benefit Services, Inc.
- 4:45 p.m. MCUPA-HR Chapter Business Meeting (see separate agenda)
- 5:30 p.m. Networking and Cash Bar with Professional Partners and Colleagues
- 6:00 p.m. Dinner

Friday, October 21, 2011

- 7:30 a.m. Breakfast Buffet (Sponsored by: ING)
Networking with Professional Partners and Colleagues
- 8:30 a.m. Welcome Back!
- 8:45 a.m. – 9:45 a.m. **TOOL FOUR:** Developing an Effective Retirement Strategy During Uncertain Times
Diane Short, TIAA-CREF
- 10:00 a.m. – 11:00 a.m. **TOOL FIVE:** Bullying and Workplace Violence
Jim Peterson, J.W. Terrill
- 11:00 a.m. – 11:30 a.m. Break (Sponsored by: TIAA-CREF)
Exhibit Hall Open (last chance to visit with Professional Partners)
- 11:30 a.m. – 12:30 p.m. **TOOL SIX:** High Stakes Leadership
Hank Epstein, The Quality Coach!
- 12:30 p.m. Closing Remarks



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SPEAKERS

SESSION (TOOL) ONE: Your Survival Guide to the IRS' Higher Ed 403(b) Compliance Check

Presenters: Linda Segal-Blinn, ING & Daniel Gardner, IRS

Topic Summary: You have adopted your 403(b) plan document and identified those employees who are eligible to contribute to that 403(b) plan. If you are among the 300 public and private higher education institutions randomly selected by the IRS, you now will need to prove this - starting in April 2011, the IRS has launched a Compliance Check initiative to ensure that 403(b) plans sponsored by higher education employers extend participation in the 403(b) plan to all eligible employees.

The IRS Employee Plans Compliance Unit's webpage announces that the new "featured" project is the rollout of the universal availability questionnaire to Higher Education 403(b) plans. Be aware of potential compliance pitfalls to respond successfully to the Compliance Check.

SESSION (TOOL) TWO: The Value of a Healthy Culture: Achieving Results via a Healthy Campus Strategy

Presenters: Ruth Donahue & Penny Finch, Sibson Consulting, A Division of Segal

Topic Summary: Sibson found that a healthy and effective workplace achieves better health, absence, retention and safety outcomes. Sibson conducted a study of employers nationally to test its Healthy Enterprise maturity model and understand the impact strategies and practices have on driving outcomes such as health, absence, turnover and safety. Sibson's analysis of its nearly 300 survey respondents, including 71 higher education institutions, validates its maturity model and identifies a number of significant correlations that drive outcomes and program participation.

SESSION (TOOL) THREE: Healthcare Reform – What's On The Horizon?

Presenter: Lisa Collins Carlson, Gallagher Benefit Services, Inc.

Topic Summary: Discussion of Healthcare Reform including near term requirements for employer's sponsoring health plans (what employers need to do between now and 2014), any specific impact to universities, status of litigation (appeals and supreme court outlook), and 2014 requirements (individual and employer mandates).

SESSION (TOOL) FOUR: Developing an Effective Retirement Strategy During Uncertain Times

Presenter: Diane Short, TIAA-CREF

Topic Summary: It is always important to think about retirement goals and the plans we make to achieve them. During this uncertain economic period, it is even more important to focus on the steps we need to take to help ensure our future. This presentation will examine the impact of the recent economic downturn, explore what employers can do, and discuss how employees can manage their retirement income during volatile times. Among historical downturns, the current one is profound. Attend this presentation to learn more about the challenges we face and the potential solutions for your institution and its employees. Reviews options available to employers in constructing early retirement programs and provides an in-depth discussion of both systematic withdrawal of income and life annuities.

SESSION (TOOL) FIVE: Bullying and Workplace Violence

Presenter: Jim Peterson, J.W. Terrill

Topic Summary:

- ◆ Effects on the Workplace
- ◆ Employer Responsibilities
 - Steps to Maintain a Violence-free Workplace
- ◆ Indicators of Threatening/Violent Behavior
- ◆ Post-Incident Response

SESSION (TOOL) SIX: High Stakes Leadership...staying connected to your humanity in an environment of relentless change and mind-boggling complexity

Presenter: Hank Epstein, The Quality Coach!

Topic Summary: We live in challenging times. Rapid, relentless change and mind boggling complexity threaten the very survival of every organization, whether large or small. How do leaders cope with these high stakes realities in their daily activities? Hank Epstein, partner in The Quality Coach!, a 20 year old business and executive coaching practice that specializes in talent management and total teamwork, recommends that we reconnect with our own humanity and the humanity of our followers. How does our humanity influence results? How do we know if we're doing a good job of reconnecting? What are some practical strategies for using our humanity to address change and complexity?

Country Club Hotel & Spa Accommodations

The 2011 Fall Conference will be held at the **Country Club Hotel & Spa in Lake Ozark, Missouri**. This boutique-style hotel is nestled in the heart of Lake of the Ozarks, offering outstanding recreational facilities, including outdoor tennis courts, basketball court, racquetball court, heated junior Olympic-sized indoor lap pool, indoor hot tub, billiards, Ping-Pong, outdoor swimming pool, fitness center, massage therapy, and easy accessibility to many of the area's finest golf courses. **Visit the Country Club Hotel & Spa at www.countryclubhotel.com to learn more!**

MCUPA-HR has negotiated a special room rate of \$79 per night, plus tax. To make reservations, contact the hotel directly at 800-964-6698 and mention MCUPA-HR. **The special rate is guaranteed through September 20, 2011.** After that date, room rates may increase. Direct your notice of cancellation to the Hotel at least 72 hours prior to the conference.

Directions

From Columbia ~ Take Hwy 63 south to Jefferson City. In Jefferson City turn right on 54 west. Follow 54 west about 50 miles to the Business 54 exit in Lake Ozark. At Lake Ozark, exit onto Business 54 (Bagnell Dam Exit). Go about 2 miles on Business 54 to 1st stoplight. Turn right at the stoplight onto State Rd. HH (Horseshoe Bend Parkway) for about 1.5 miles; then turn right on Carol Road. We are a half-mile down Carol Road on the left.

Travel time approximately 1 1/2 hours.

From Kansas City ~ Take Hwy 50 east from Lees Summit to Tipton. At Tipton stoplight, take Hwy 5 south. Hwy 5 south will merge with Hwy 52. Go left on 52 east. Take 52 east to Eldon. At 2nd stoplight in Eldon, turn right. That will take you to Hwy 54. Turn right on 54 west. Follow 54 west about 9 miles. At Lake Ozark, exit onto Business 54 (Bagnell Dam Exit). Go about 2 miles on Business 54 to 1st stoplight. Turn right at the stoplight onto State Rd. HH (Horseshoe Bend Parkway) for about 1.5 miles; then turn right on Carol Road. We are a half-mile down Carol Road on the left.

Travel time approximately 3 1/2 hours. From the airport, take 435 loop south to Hwy 50.

From Springfield ~ Take I-44 east to Lebanon. At Lebanon, take Hwy 5 north (2nd exit) to Camdenton. At the stoplight in Camdenton, turn right onto Hwy 54 east. Take 54 east about 15 miles to the Bagnell Dam exit in Lake Ozark. Turn right at the stoplight onto Business 54 (Bagnell Dam Blvd). Go about 2 miles on Business 54 to the next stoplight and turn left onto State Rd. HH (Horseshoe Bend Parkway) for about 1.5 miles; then turn right on Carol Road. We are a half-mile down Carol Road on the left.

Travel time approximately 2 hours.

From St. Louis ~ Take I-70 west to Kingdom City. Exit onto Hwy 54 south(west). Take 54 south(west) 80 miles to Lake Ozark. At Lake Ozark, exit onto Business 54 (Bagnell Dam Exit). Go about 2 miles on Business 54 to 1st stoplight. Turn right at the stoplight onto State Rd. HH (Horseshoe Bend Parkway) for about 1.5 miles; then turn right on Carol Road. We are a half-mile down Carol Road on the left.

Travel time approximately 3 hours.

General Information

Dress Code

Dress is business casual or casual. Feel free to wear clothes that are comfortable and supportive of your learning. You may want to bring a jacket in case the conference rooms are cold.

Exhibit Area

Professional Partners will be showcasing their products and services, while providing you with the latest information and trends in the field of human resources.

Prizes/Drawings

Each college/university is asked to donate an item (one per registrant/attendee) for door prize drawings. You may bring an item of your choosing. This could include something from your college/university, gift cards, chocolates, etc.

MCUPA-HR Board of Directors 2010-12

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MCUPA-HR 2011 FALL CONFERENCE OCTOBER 20-21



Registration Form

Please fill out a separate registration form for each attendee.

Name: _____

Title: _____

Institution: _____

Address: _____

City, State, Zip: _____

Phone Number: _____ Fax Number: _____

E-mail Address: _____

Are you a first time attendee? Yes _____ No _____



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CONFERENCE REGISTRATION (includes SIX sessions, two breaks, Thursday lunch, Thursday dinner & Friday breakfast):

\$_____ Conference registration for first and second institutional member attendees: **\$65 each**

\$_____ Conference registration for third member attendee: **FREE**

\$_____ Conference registration for non-member (of MCUPA): **\$100**

\$_____ Guest meal plans (Thursday lunch, Thursday dinner & Friday breakfast): **\$30**

\$_____ **Grand Total** (conference registration(s) and meal passes)

Please indicate if you will attend Thursday's lunch Yes _____ No _____

Please indicate if you will attend Thursday's dinner Yes _____ No _____

Please indicate if you will attend Friday's breakfast Yes _____ No _____

_____ If you require special accommodations (dietary/other), check here and we will contact you.

*Unfortunately, MCUPA-HR cannot accept credit card payment.
Make checks payable to MCUPA-HR and submit with your registration form(s) to:*

Brenda Jones, University of Missouri, 1095 Virginia Avenue, Columbia, MO 65211

Cancellations/Substitutions: Must be made in writing (mail, e-mail) to Brenda Jones. Cancellations after October 7, 2011 and no-shows are ineligible for refunds due to arrangements that are made on your behalf.

Questions or membership inquiries may be directed to Brenda Jones, MU, at 573-882-7976, or jonesbj@missouri.edu