



JUNE 17, 2016

NAVIGATING HUMAN RESOURCES

CHANGE, CHALLENGE & OPPORTUNITY:
A ROADMAP TO SUCCESS

AGENDA

Welcome to Navigating Human Resources: Change, Challenge & Opportunity. We are so happy you joined us, along with 100+ of your colleagues and an excellent line up of presenters. Today's program addresses topics in an ever changing landscape of human resources - from wellness and culture to legal and compliance topics. Our goal at CNY SHRM is to assist you in your role as a human resources professional, equipping you with knowledge to do your job better as you serve the employees of your company. Enjoy!

- Mary Stone President, CNY SHRM

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|---|--------------------------|
| Registration..... | 7:30am - 8am |
| Breakfast..... | 8am - 8:30am |
| Breakfast Keynote Session..... | 8:30am - 10am |
| Top 10 Mistakes Employers Make | |
| <i>Louis DiLorenzo, Esq.</i> | |
| Transition (visit sponsors)..... | |
| 10am - 10:15am | |
| Morning Break-out Sessions I..... | 10:15am - 11:15am |
| A. Why & How to Use Social Media for Recruiting | |
| <i>Suzanne Benderski, Jody Frawley, & Emily Shocklee</i> | |
| B. Helping Employees Achieve Financial Wellness: A Roadmap to Success | |
| <i>Zina Cardinale-Nelson, Jacquelyn Marion, Marla Prince</i> | |
| Transition (visit sponsors)..... | |
| 11:15am - 11:30am | |
| Morning Break-out Sessions II..... | 11:30am - 12:30pm |
| A. The Halls of Albany...Legislative Update | |
| <i>Frank Kerbein</i> | |
| B. Effective Open Enrollment Strategies & Ensuring Compliance | |
| <i>Daniel Elliott</i> | |
| Transition (visit sponsors)..... | |
| 12:30pm - 12:45pm | |
| Lunch..... | 12:45pm - 1:15pm |
| Lunch Keynote Session..... | 1:15pm - 2:45pm |
| Building a Transformational Culture | |
| <i>Dr. Scott Vinciguerra</i> | |
| Transition (visit sponsors)..... | |
| 2:45pm - 3pm | |
| Afternoon Break-out Sessions..... | 3pm - 4pm |
| A. The Missing Key to Employee Wellness | |
| <i>Kelly Springer</i> | |
| B. Reimagine Background Investigations | |
| <i>Michelle Pyan</i> | |
| Conference Closing Remarks/Giveaways..... | 4pm |
| <i>Must be present to win</i> | |



PROGRAM

Breakfast Keynote

Top 10 Mistakes Employers Make (8:30am, Huron/Ontario/Michigan)

Lou DiLorenzo, Esq., Managing Member of Bond, Schoeneck & King, PLLC's New York City office, will share the insights he has gathered over his forty years of representing employers of all sizes. Lou's keynote will outline the most common mistakes he has observed employers make, the liability caused by those mistakes, and most importantly, how you can avoid the same mistakes. Lou's entertaining style and depth of experience promise to make this a compelling and practical session you do not want to miss!

Morning Break-out Session I

A. Why & How to Use Social Media for Recruiting (10:15am, Superior Room)

In this presentation, you will learn about the various Social Media platforms and their demographic audience profiles. You will learn best practices of how to engage with potential candidates on the different platforms; Facebook, Twitter, LinkedIn and more. We will share with you success stories on how marketing with Social Media can promote the benefits of working at your company and increase moral among your current employees. After this session, you will feel more empowered to tackle the world of Social Media for Recruitment.

B. Helping Employees Achieve Financial Wellness: A Roadmap to Success (10:15am, Erie Room)

One of HR's greatest challenges is managing the costs of employee stress to an organization's performance. A strong financial education program can help reduce employee financial stress and boost loyalty and retention at the same time. Join Zina Cardinale-Nelson, Small Business Development Director of PlanSmart at MetLife, one of the largest life insurance companies in the world, as she discusses the implementation of PlanSmart's workplace financial education series. This session will discuss the best ways to successfully add a financial education component to your employee wellness program, or strengthen your existing financial education program. You will learn how to:

- *Gain buy-in for a financial education program from your executive team
- *Create a curriculum tailored to the specific needs of your workforce
- *Drive participation in and awareness of your financial education program via effective internal communication
- *Enable employee action beyond workshop learning
- *Implement solutions to typical challenges

PROGRAM

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Morning Break-out Session II

A. The Halls of Albany...Legislative Update (11:30am, Superior Room)

This program will look at the factors that led to an historic legislative session in Albany – especially for the human resource/business community. How minimum wage and paid family leave controlled the budget process and how control of the legislature dictated legislator behavior. We will also review rule-making activities at the federal level and how the 2016 Presidential campaign is driving events that affect HR.

B. Effective Open Enrollment Strategies & Ensuring Compliance (11:30am, Erie Room)

Open enrollment is just around the corner for most companies. In this break-out session, learn how a fully compliant benefits open enrollment process is designed. Educate employees, help them become better health care consumers, and inspire employees to play an active role in their own physical health; and in the “fiscal health” of your company as well ...while making sure your program is 100% compliant!

Lunch Keynote

Building a Transformational Culture (1:15pm, Huron/Ontario/Michigan)

In business, and in life, we often strive to reach our potential through our work-ethic, talent, and dedication. However, what are we doing each day to build a community that is empowered and altruistic vs. one that operates off of intimidation or compliance? This hands-on, interactive workshop will offer participants an opportunity to reflect on their leadership journey as it evolves toward becoming a self-actualized, reflective leader. Additionally, recent findings in neuroscience as they relate to leadership will confirm how transformational leaders invite trust, teamwork, compassion, and selflessness to create a working culture which fosters solid relationships that can last a lifetime.

Afternoon Break-out Sessions

A. The Missing Key to Employee Wellness (3pm, Superior Room)

Attendees will learn how nutrition plays a crucial role in employee health and why it is important to implement a nutrition program into your wellness plan. Kelly Springer will educate how to implement an Employee Wellness program into your workplace and what certifications/degrees to look for in your Educator. She will discuss return on investment and how to pitch the program to company's decision makers. She will also share great weight loss tips to put into practice at your organization.

B. Reimagine Background Investigations (3pm, Erie Room)

In this session, you will learn the latest evolutions in technology and practices of the background investigations industry. As new laws and regulations are being passed, cases are being settled, and guidelines are being developed, it becomes even more important for companies to stay aware and ensure that their policies and procedures are up-to-date. Companies can reduce their liability for lawsuits such as negligent hiring by implementing comprehensive background investigations.

KEYNOTE SPEAKERS

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LOUIS DILORENZO

Louis DiLorenzo has practiced labor and employment law for more than 35 years and is managing member of the firm's New York City office.

Louis represents employers and management in all aspects of labor and employment law. His areas of experience include collective bargaining, workplace investigations, NLRB proceedings, labor audits, supervisory training, wage and hour issues, arbitration, jury trials in both state and federal courts, wage incentive plans, OFCCP audits and proceedings, employment litigation before the EEOC and the Human Rights Division and alternative dispute resolution techniques. Louis also serves sev-

eral insurance companies as panel counsel (e.g., AIG and Chubb) with respect to employment litigation matters. From 2002-2004, he served as General Counsel and Secretary to Agway, Inc., a Fortune 500 Company.

Louis has been a key note speaker at numerous seminars throughout the United States and other countries on a wide variety of Labor and Employment Law topics. In addition, he has lectured to various university groups, including the College and University Personnel Association; local, state and national SHRM Conferences; and a number of national and regional business associations.



DR. SCOTT VINCIGUERRA

Dr. Scott Vinciguerra has spent nearly 20 years presenting innovative and impactful leadership consulting services to thousands of participants from the business, government, civic, educational, not-for-profit, and community-based sectors of industry. As a former international basketball coach, faculty member and administrator in both public and higher education, he combines a sense of humor with courageous questions and conversations.

Scott has published several professional articles, and has twice presented qualitative research at the internationally prestigious Learning & The Brain Conference, sponsored by the Dana Alliance for Brain Initiatives and the Harvard

University Faculty Club. His book, *Conquering Sisyphus: Embracing the Journey Toward Transformational Leadership*, offers readers a developmental and holistic approach to the capacity of making a difference in the lives of those you lead, through humility, selflessness, and compassion. Look for his new release, *Leading with Virtue: Competencies for Contemporary Leadership*.

SPEAKERS

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SUZANNE BENDERSKI

CTS, CAP-OM, is the Project Manager for CPS Recruitment in Syracuse, NY. In this role, Suzanne works closely with the sales, recruiting and management teams to coordinate a wide variety of projects and initiatives, including managing the company's social media presence and spearheading the online job posting process with numerous job boards and websites. Since 2014, CPS has seen website traffic from social media sites increase over 400%.

Before joining CPS Recruitment in 2011, Suzanne worked in the Syracuse community for over 20 years for a diverse range of organizations; including a Fortune 500 staffing and recruiting company, small business startups, and a well-known non-profit educational program.

A firm believer in continuous improvement and learning, Suzanne achieved and maintains Certified Temporary Specialist and Certified Administrative Professional – Organizational Management ratings through the National Association of Personnel Services (NAPS) and the International Association of Administrative Professionals (IAAP) respectively. Suzanne has been a very active member and chapter officer of IAAP since 1998. She holds a degree in Business Management from SUNY Empire State College.



DAN ELLIOTT

Dan offers employers over 20 years of experience in strategic employee benefit management. Prior to becoming a plan management consultant/broker in 2005, Dan was the Upstate NY Broker Consultant for United Healthcare (1995-2000) and the Upstate NY Market Manager for Aetna, Inc. (2000- 2005). Learning the health insurance business for over 10 years "from the inside" of two of the nation's largest carriers enables Dan to strategically negotiate his client's best interests with insurance carriers to get them better terms, contracts and rates; whether the plan is fully-insured or self-funded.

Dan's primary focus is on assisting large group employers (100+ employees) strategically negotiate & design their health insurance offerings. His expertise lies in risk management negotiations & design, underwriting methodology, utilization review analysis, cost containment initiatives, self-funding arrangements, stoploss management (captive or direct), employee communication/education, wellness programming, performance improvement technology, private exchanges and regulatory compliance.

As natives of the Upstate NY, Dan and his wife Victoria enjoy being actively involved within the community and participating in the many outdoor activities Central NY has to offer.

SPEAKERS

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JODY FRAWLEY

Over the past 24 years, Jody has been blessed to work in an industry that is her passion— Advertising. From television, radio, newspaper, web site development and online advertising, she has enjoyed meeting business owners and helping them figure out what their unique selling proposition is, and who their 'best customers' are. In the last 3 years, her advertising specialty has focused in on 'Recruitment Advertising'; helping employers brand themselves as a great place to work, and entice job seekers to apply. She does this by using newspaper and digital advertising; Paid Search, SEO, Social Media, Email marketing, Job Boards, etc...as a Recruitment Advertising Consultant with Syracuse Media Group; Syracuse.com and The Post Standard.

On a personal note, Jody is the youngest of 4 in a family that runs a 3rd generation dairy farm, based in the Adams/Watertown, NY area. She is thankful for 21 years of marriage to her husband, Pat and for her 17 year old son Daniel, who is attending American International College in Springfield Massachusetts this Fall. In her spare time, you'll find Jody helping the Membership Committee for CNY SHRM, serving hotdogs with the Phoenix Sports Boosters, teaching Youth Group or singing in the choir at her church and watching A LOT of baseball games—working on her tan. There are 3 things you should know about Jody: (1) She will never give you a compliment unless you deserve it, (2) She will always look for the positive side of any situation, and (3) If she doesn't know the answer, she will readily admit it and then work to get it for you.

SPEAKERS

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FRANK KERBEIN

Frank Kerbein is the director of the Center for Human Resources at The Business Council of New York State, Inc. and responsible for advocacy on construction and transportation issues. Frank comes to The Business Council from the New York State Funeral Directors Association where he was Director of Member Relations. At the Funeral Directors Association, Frank provided human resource and OSHA consulting services to employers of all sizes. Additional experience includes roles as the Executive Director of Foundation Services and Director of Education and Training. Prior work experience includes human resources staff and leadership positions in the financial services and health care arenas.

Frank is a graduate of Cornell University's School of Industrial and Labor Relations. He is also SPHR certified and has more than 30 years of experience in all areas of human resource management.



JACQUELYN MARION

Jacquelyn Marion is a Manager of Retirement & Financial Wellness employed by The Lifetime Healthcare Companies, the parent Company of Excellus Health Plan, Inc. BCBS., with over 12 years of experience.

The Lifetime Healthcare Companies is a family of companies that provide health coverage and health care services to 1.9 million people. The \$6 billion nonprofit company is headquartered in Rochester, N.Y., and employs more than 6,000 workers throughout Upstate New York through nationally recognized businesses.

As the Manager, Retirement & Financial Wellness for the Lifetime Healthcare Companies, member of the Excellus Retirement Committee, Lifetime Care Retirement Committee and Corporate Wellness Committee, Jacquelyn manages all Corporate Wellness/Retirement programs for the organization.

SPEAKERS

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ZINA CARDINALE-NELSON

As Director of Small Business Development, Zina has a passion for the financial wellness industry. She is driven by the importance of financial literacy and how it can have a significant impact on one's life. Zina takes pride in her firm, MetLife Premier Client Group of Upstate NY, its culture, dedication and commitment to providing financial wellness programs to various size organizations. MetLife PlanSmart has received commendation and awards from Pension and Investments, Hermes Creative Awards, and STAR for the Retirewise® financial education program.

Through MetLife's Retirewise® and Topical program, Zina's team provides employees with objective financial education through workshops and professional resources they need to help them take concrete steps toward meeting their goals. The programs are complementary, national, turnkey, and have proven success.

The topics and causes that matter to Zina are education, children, and health. She has published several articles on financial wellness for The Rochester Women's Magazine and leads her firm's community involvement initiative with Junior Achievement, a K-12 financial literacy program, for the Elmira, Syracuse, Rochester, and Buffalo, NY locations. She is a supporter of Bivonia Child Advocacy Center, FoodLink, and an active committee member of Healthy Syracuse, which helps to create an environment that promotes healthy behaviors and reduces the prevalence of chronic disease. Zina resides in Rochester, NY with her husband and two teenage children. She is a graduate of the Rochester Institute of Technology with a Bachelor of Science in Business, and currently working towards her Master's degree with a focus in finance and strategic management at Harvard.

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MARLA PRINCE

Marla manages the benefits program and wellness initiatives for Bond, Schoeneck & King, a full-service law firm that has 9 offices across New York State, an office in Naples, Florida, and in Overland Park, Kansas. Her prior HR generalist experience includes working for two environmental engineering firms and a local manufacturing company. Marla received her associate's degree in Business Administration from Onondaga Community College and her bachelor's degree in Business Administration from Oswego State College. She received her PHR and SHRM-CP Certifications and serves as an active member of CNY SHRM's Total Rewards Committee. At

Bond, Marla is the co-chair of the Wellness & Safety Committee and was instrumental in its development over a decade ago. She enjoys researching the latest benefits and wellness trends and is always looking for innovative and cost effective ways of keeping the program fresh and engaging. She also assists with development and maintenance of the firm's policies and procedures, employee relations, and workplace safety concerns.



MICHELLE PYAN

Michelle Pyan is the owner of Commercial Investigations LLC (CI), a licensed private investigative agency. CI is a Certified Woman-Owned Business Enterprise (WBE) located in a HUB Zone (certification pending). Michelle founded the agency in 2004 and has grown the business with a proactive approach by setting new standards in the background investigations industry. As President, she is responsible for the strategic direction which assists our multi-industry client base. CI currently does business worldwide with various sized companies, including many non-profit organizations and Fortune 500 companies. The core business of CI involves background investigations from pre-employment, volunteer and

tenant to business transactions including mergers and acquisitions.

Since 1998, Michelle has been examining details of the Fair Credit Reporting Act and other state and federal laws which are applicable to background investigations and human resource operations. Michelle is frequently asked to be a keynote speaker at various trade and professional associations, has led seminars and discussions concerning background investigations, payroll fraud, business risk mitigation and other related topics. Michelle has published several articles relating to these topics as well. Michelle is an active member of The National Association of Background Screeners (NAPBS), and the Society for Human Resource Management (SHRM).

SPEAKERS

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In 2009, Michelle was awarded the Business Review Woman to Watch / Woman Who Mean Business award. In 2013, Michelle joined the Women President's organization. Michelle has been a licensed private investigator in Wisconsin, Florida and New York. Michelle has an MBA from the University of Wisconsin Oshkosh and a BS from Winona State University, majoring in Paralegal Studies/Pre-law. Michelle splits her time between the CI's New York and Florida offices. Michelle and her husband, Bill, enjoy golf and music in their leisure time.



KELLY SPRINGER

Kelly Springer's passion for nutrition started at a very young age and grows stronger every day. She has been fortunate to have worked in multiple areas of nutrition. She started her career at age 17 and has worked as a clinical, residential, bariatric, community, retail and media dietitian. She now owns her own nutrition company, Kelly's Choice, LLC. Kelly's Choice contracts RD's to promote the message of "real food". Kelly is currently consulting with food companies, colleges, sports teams, school districts, restaurants, medical practices, television stations and work places.

Kelly's goal is to share her passion for nutrition with the world. Kelly has her Bachelors of Science in Nutrition from

West Virginia University and her Masters in Health Education from SUNY Cortland.



EMILY SHOCKLEE

Emily is the Human Resources Recruiter at Annese & Associates, Inc., an integrated technology solutions provider, and works from the Syracuse office. Emily has 9 years of experience as a human resources generalist however, focuses her efforts in the areas of recruiting, onboarding and retaining top talent for Annese. Emily collaborates across Annese's 7 office locations, with the Sales, Service, Operations and Marketing teams to understand their specific recruiting needs and identify candidates who poses these qualities in alignment with Annese's core values.

Prior to joining Annese & Associates, Inc. in 2015, Emily worked for Gensler, a global design firm, as the Boston office's HR/Office Manager, and HR Administrator for a Boston based law firm. Emily holds a Bachelor's degree in Business Administration from Nichols College. Emily can often be found spending time with her husband and dog in the outdoors. She enjoys gardening, boating, hiking, and golfing.

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