

EVOLVE

Benefits and Workforce Strategies Summit

June 25-27, 2024

Delta Hotels Calgary Downtown
Calgary, Alberta



Preconference Options June 24-25, 2024



**Total
REWARDS**
CERTIFICATE



**Advanced
PENSIONS**
CERTIFICATE



www.ifebp.org/EVOLVE

International Foundation
OF EMPLOYEE BENEFIT PLANS  CANADA

EVOLVE

Benefits and Workforce Strategies Summit

June 25-27, 2024

Delta Hotels Calgary Downtown
Calgary, Alberta

Register for EVOLVE
and get 20% off on
preconferences with
code CALGARY20.*

It's All About Engagement

You'll have plenty of opportunities to share your views, get your questions answered and network with other professionals, all while getting the insights you need to sustain and grow your organization.

- Welcome reception on Tuesday, June 25! Drop in anytime between 5:00 and 7:00 p.m.
- Panel discussions with industry experts
- Real-life case studies from leading organizations
- "Speed-dating-style" roundtables on topics of interest

Who Should Attend

This conference is perfect for:

- Experienced Canadian HR, pension and benefits professionals who want to know the latest best practices, trends and strategies
- Those who are new to the industry who want to learn and build their network
- HR leaders who are taking on a new mandate and want to upskill
- Providers (e.g., consultants, administrators, benefit coordinators) looking to better serve their clients.

Sponsored Attendee Tables Available!

Invite your clients and colleagues to be your guests at a discounted rate.

Table of six: C\$6,000 (a \$7,700 value!)

*Restrictions apply.

PROGRAM AT A GLANCE

All times are listed in Mountain Time (MT).

MONDAY JUNE 24, 2024	
8:30 a.m.-4:30 p.m.	<i>Preconference Training</i> : Total Rewards Certificate (day 1)
	<i>Preconference Training</i> : Advanced Pensions Certificate (day 1)
TUESDAY JUNE 25, 2024	
8:30 a.m.-4:30 p.m.	<i>Preconference Training</i> : Total Rewards Certificate (day 2)
	<i>Preconference Training</i> : Advanced Pensions Certificate (day 2)
5:00-7:00 p.m.	Welcome Reception
WEDNESDAY JUNE 26, 2024	
7:30-8:30 a.m.	Registration and Continental Breakfast
8:30-9:30 a.m.	<i>Keynote</i> : Beyond Demographics: How Valuegraphics Can Help You Understand Your Workforce
9:30-10:00 a.m.	Break
10:00-10:45 a.m.	Winning the Marathon for Talent
10:45-11:30 a.m.	The Emerging Role of Technology in Disability Management
11:30 a.m.-12:30 p.m.	<i>Panel Discussion</i> : Addressing the Benefit Needs of Women in the Workplace
12:30-1:30 p.m.	Lunch
1:30-2:15 p.m.	<i>Breakout</i> : Top Drug Trends to Watch
	<i>Breakout</i> : Decumulation World Tour: Learnings From Different Retirement Markets
2:15-3:00 p.m.	<i>Panel Discussion</i> : Connecting the Dots: How Can We Make It Easier for Employees to Navigate Their Benefits?
3:00-3:30 p.m.	Break
3:30-4:30 p.m.	“Speed-Dating-Style” Roundtable Discussions
4:30-6:30 p.m.	Networking Reception
THURSDAY JUNE 27, 2024	
7:30-8:30 a.m.	Registration and Continental Breakfast
8:30-9:30 a.m.	Best Practices in Leadership and Culture: What Does It Take to Be a Top 100 Employer?
9:30-10:15 a.m.	Preventing Burnout at Work: Strategies for Employers
10:15-10:30 a.m.	Break
10:30-11:15 a.m.	Terminating Toxicity: Strategies for Leaders to Confidently Deal With Toxic Behaviours
11:15 a.m.-12:15 p.m.	<i>Panel Discussion</i> : Case Studies in Change Management

PRECONFERENCE TRAINING



Total REWARDS CERTIFICATE

Register for EVOLVE
and get 20% off the
Total Rewards Certificate
with code CALGARY20.*

Monday, June 24-Tuesday, June 25, 2024
8:30 a.m.-4:00 p.m. MT daily

Through May 14, 2024	Member C\$1,195	Nonmember C\$1,415
After May 14, 2024	Member C\$1,495	Nonmember C\$1,715

The Total Rewards Certificate provides Canadian HR, pensions and benefits professionals with a holistic and employee-centric view of the total rewards landscape, addressing both fundamentals and emerging trends. This two-day preconference teaches the design, development and implementation of an effective and sustainable total rewards strategy.

What Makes This Program Unique

Upon completing the certificate, you'll be able to:

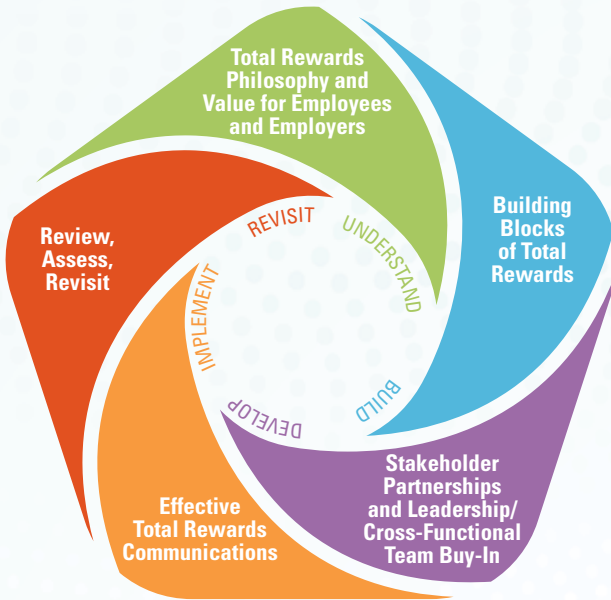
- Understand the overall total rewards framework and how it aligns with business and HR strategies
- Express the value of total rewards to leadership and across teams
- Learn and apply total rewards best practices
- Integrate total rewards into your organization's existing culture/employee experience
- Know when to engage providers and how to leverage their skill sets
- Describe the value proposition for the employer and the employee
- Understand the basics of creating a modern and viable total rewards strategy
- Earn a Certificate of Achievement!

Who Should Attend

- Anyone who is new to total rewards or wants to brush up on the latest total rewards developments and trends
- Canadian HR professionals who want to learn more about compensation, pensions and benefits in a total rewards context
- Providers (e.g., brokers, consultants, administrators, benefit coordinators) looking to broaden their knowledge to better serve their clients

*Restrictions apply.

Program Modules and Agenda



Monday | June 24, 2024

8:30-9:30 a.m.—Understanding the Total Rewards Philosophy and Value for Employees and Employers

9:30-10:30 a.m.—Developing Stakeholder Partnerships and Getting Leadership/ Cross-Functional Team Buy-In

10:45 a.m.-12:30 p.m.—Building Blocks of Total Rewards—Compensation

1:30-3:15 p.m.—Building Blocks of Total Rewards—Health and Group Benefits

3:30-4:30 p.m.—Building Blocks of Total Rewards—Learning, Career Development and Recognition

Tuesday | June 25, 2024

8:30-10:30 a.m.—Building Blocks of Total Rewards—Pension and Retirement Savings

10:45 a.m.-12:30 p.m.—Building Blocks of Total Rewards—Wellness and Work-Life Balance

1:30-3:00 p.m.—Implementation and Effective Total Rewards Communications

3:15-4:30 p.m.—Review, Assess, Revisit

Continental breakfast and lunch are provided.

www.ifebp.org/TotalRewardsCanada

PRECONFERENCE TRAINING



Advanced PENSIONS CERTIFICATE

Register for EVOLVE and get 20% off the Advanced Pensions Certificate with code CALGARY20.*

Monday, June 24-Tuesday, June 25, 2024
8:30 a.m.-4:00 p.m. MT daily

Through May 14, 2024	Member C\$1,195	Nonmember C\$1,415
After May 14, 2024	Member C\$1,495	Nonmember C\$1,715

Designed for those with experience in the retirement savings industry, this Canadian certificate program provides advanced-level pension and investment content across four main modules:

1. Governance
2. Defined benefit plans
3. Defined contribution plans
4. Investments.

Benefits of Attending

- Showcase your expertise and commitment to your profession and industry.
- Get in-depth knowledge on pension and investment concepts to help you back better plan decisions.
- Enjoy greater opportunities for interaction and discussion with your peers.

Program Modules and Agenda

Monday | June 24, 2024

8:30 a.m.-12:00 noon—Governance
1:00-4:00 p.m.—Defined Benefit Plans

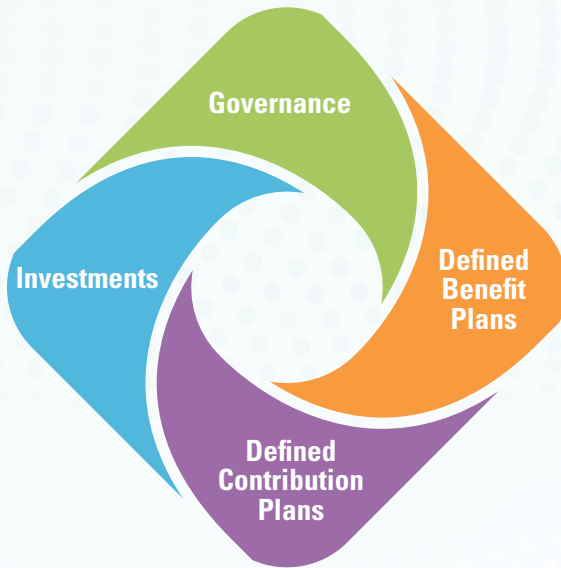
Tuesday | June 25, 2024

8:30 a.m.-12:00 noon—Defined Contribution Plans
1:00-4:00 p.m.—Pension Plan Investments

Continental breakfast and lunch are provided.

*Restrictions apply.

Course Modules



1. Governance

Gain a solid understanding of the regulatory framework for pensions in Canada, including applicable legislation, common law factors, federal and provincial regulators, tax treatment, CAPSA guidelines and administrative functions.

2. Defined Benefit (DB) Plans

Learn how DB plans are designed; the roles of actuaries, pension administrators, counsel and others in administering DB plans; funding rules and strategy; investment strategy; risk management and transfer; corporate transactions; and current trends.

3. Defined Contribution (DC) Plans

Understand how DC plans are designed; the roles of custodians, consultants, financial advisors and others in administering DC plans; accumulation and decumulation phases; investment portfolios; investment monitoring; member communications; corporate transactions; and current trends.

4. Pension Plan Investments

Know the pension investment building blocks and asset classes, the roles of various players in the pension investment process, investment governance, delegation and monitoring, ESG and sustainable investing, spotting issues with investment compliance, pension investment regulatory rules, corporate transactions and trends.

EVOLVE

Benefits and Workforce Strategies Summit Agenda

All times are listed in Mountain Time (MT).

Welcome Reception Tuesday, June 25. Drop in anytime between 5:00-7:00 p.m.

Wednesday | June 26, 2024

7:30-8:30 a.m.

Registration and Continental Breakfast



8:30-9:30 a.m.

Keynote: Beyond Demographics: How Valuegraphics Can Help You Understand Your Workforce

As HR, pensions and benefits leaders, you know that improving workplace culture and employee retention is more critical than ever. At its core, your role is about deeply understanding and connecting with people and what they value. Why? Because core human values are the driving force behind every behaviour, decision and emotion in the workplace. Understand what people value, and you truly understand people.

In this transformative keynote session, David Allison will share insights from a specialized study of individuals across the country who chose their jobs based on the pensions and benefits they were offered. Leveraging nearly one million global surveys, David will unveil the shared values of these employees and show how understanding these values can revolutionize HR, pensions and benefits strategies.

Speaker: David Allison, Founder, Valuegraphics Project



Hear from David Allison:

9:30-10:00 a.m.

Networking Break



10:00-10:45 a.m.

Winning the Marathon for Talent

Canada's labour market is undergoing structural changes that are impeding the attraction and retention of skilled, high-performing talent. As employers continue to race in a multiyear marathon for talent, leaders know for certain that engaging and retaining top performers is the key to long-term success, and pensions are emerging as a key differentiator for employers. Derek Dobson draws from his expansive network of leaders across sectors to say what is driving today's model of the employee value proposition, according to CEOs and C-suite leaders.

Speaker: Derek W. Dobson, Chief Executive Officer and Plan Manager, Colleges of Applied Arts and Technology (CAAT) Pension Plan

Wednesday | June 26, 2024 *(continued)*



10:45-11:30 a.m.

The Emerging Role of Technology in Disability Management

Technology is transforming traditional disability management approaches by leveraging innovative solutions to enhance efficiency, accessibility and effectiveness. With advancements in artificial intelligence, data analytics and telemedicine, technology is enabling proactive identification of potential risks, personalized support for individuals with disabilities and streamlined communication between stakeholders. By harnessing technology, organizations can optimize disability management processes, improve employee well-being and foster a more inclusive work environment.

Speaker: Liz Scott, Ph.D., M.B.A., Principal and CEO, Organizational Solutions Inc.



11:30 a.m.-12:30 p.m.

Panel Discussion: Addressing the Benefit Needs of Women in the Workplace

Women in the workforce face unique challenges and pressures, yet benefit plans have traditionally been slow to adapt. This expert panel will discuss emerging trends in women's benefits, including fertility and family planning, leaves of absence, menopause and more.

Panelists: Andrea Belvedere, AVP, Health Benefits & Solutions, Sun Life
Sonia Singh, Vice President, Sales-Canada, Progyny Inc.



Stephanie Lue-Kim, Principal, Total Health Management, Mercer



12:30-1:30 p.m.

Lunch

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Wednesday | June 26, 2024 *(continued)*



1:30-2:15 p.m.

Top Drug Trends to Watch

CONCURRENT SESSIONS

This session will review key topics and trends related to prescription drug plan benefits. The presentation will cover the emergence of nonspecialty blockbuster drugs—including how they are being used and managed—as well as:

- Drug pricing in Canada
- Trends related to drug plan spending for Canadian employers
- The quiet emergence of ADHD in plan spending
- Medical cannabis utilization in benefit plans
- Biosimilar switching
- Impact on plan sponsors regarding delays in vaccine assessments
- Meaningful therapies in the drug pipeline
- The latest on national pharmacare.



Speakers: Barbara A. Martinez, National Practice Leader, Drug Solutions, Canada Life
Michael P. Sullivan, B.S.P., M.B.A., President, Cubic Health Inc.



Decumulation World Tour: Learnings From Different Retirement Markets

CONCURRENT SESSIONS

Join these retirement rockstars on a musically inspired tour of the global decumulation landscape. This session's set list will include how different countries approach decumulation, new research providing insight into plan sponsor and participant preferences, and how they tie into the vast Canadian retirement landscape, both today and in the future.

Speakers: Jessica Sclafani, CAIA, Senior Defined Contribution Strategist, T. Rowe Price Inc.

Zaheed Jiwani, CFA, Vice President, Institutional, T. Rowe Price (Canada) Inc.



2:15-3:00 p.m.

Connecting the Dots: How Can We Make It Easier for Employees to Navigate Their Benefits?

There's a wealth of benefits information out there—but do your employees know how to find what they need, when they need it? This session will provide practical tips for helping employees navigate the complex health benefits landscape (including social benefits and employer-sponsored benefits) so you can maximize your investment as a plan sponsor.

Panelists: Tom W. Milne, Founder, SayMore Comm + Design

Luc Bourgeois, Director, Client Development and Head Communication & Change Management Solutions, TELUS Health

Eva Vallalba, M.B.A., M.Sc., VBHC Green Belt, Executive Director, Quebec Cancer Coalition



Wednesday | June 26, 2024 *(continued)*

3:00-3:30 p.m.

Networking Break

3:30-4:30 p.m.

“Speed-Dating-Style” Roundtable Discussions

In this lively, fast-paced session, attendees will choose three topics of interest and rotate across tables to discuss them (20 minutes per topic). Get to know other attendees while sharing your insights on important topics for your role.

Thursday | June 27, 2024

7:30-8:30 a.m.

Registration and Continental Breakfast



8:30-9:30 a.m.

Best Practices in Leadership and Culture: What Does It Take to Be a Top 100 Employer?

Leadership is a responsibility that both Bimbo Canada and McMillan take very seriously. Being a Top 100 Employer isn't just a box to be checked off—It's a commitment to fostering an environment where employee inclusion and well-being is paramount to future success. In this session, two leading organizations will share their journeys toward being recognized as top employers. They'll share key elements of their strategies, such as focusing on diversity, equity, inclusion and belonging; evolving benefits and wellness programs to meet the needs of

changing demographics; giving back to the communities where they live and work; making a strong commitment to safety and mental health; developing future leaders; and engaging and motivating employees through purpose-driven work.

Speakers: Laura-Lee Shennan, CEBS, Manager, Disability, Wellness & Benefits, McMillan
Leslee Wills, LL.M., Pro.Dir., Vice President, People and Corporate Affairs, Bimbo Canada

EVOLVE Benefits and Workforce Strategies Summit

Thursday | June 27, 2024 *(continued)*



9:30-10:15 a.m.

Preventing Burnout at Work: Strategies for Employers

Reducing burnout in the workplace is crucial for productivity, retention and overall well-being. To be burned out at work, a team member must be highly engaged—meaning top-performing, highly engaged contributors are at the highest risk.

Leadership needs to take proactive steps for prevention, with strategies to protect high achievers and support those recovering from burnout. In this session, we will cover:

- The practical definition of burnout
- Common causes and risk factors—recognizing the workplace factors at play
- Three key prevention strategies
- Best practice tactics to create and maintain a healthy workplace culture.

Speaker: M. Cole Cohen, Ph.D., Senior Consultant, GreenShield Health



10:30-11:15 a.m.

Terminating Toxicity: Strategies for Leaders to Confidently Deal With Toxic Behaviours

Leading a team is challenging, and dealing with toxic behaviour can make it even more so. When toxic behaviours go unaddressed, resentment grows, respect

dwindles and these behaviours can infect the entire team. This session will provide valuable insights to tackle employee attitude issues head-on. Discover the secrets to building a positive, productive workplace by learning what to focus on, how to respond effectively and the art of moving conversations forward. Become the leader who inspires lasting change and cultivates an engaged, collaborative and thriving workforce.

Speaker: Beverly Beuermann-King, CSP, Workplace Culture and Resiliency Expert, R'n'B Consulting Corp - Work Smart Live Smart



11:15 a.m.-12:15 p.m.

Panel Discussion: Case Studies in Change Management

Making benefit plan changes can have a significant impact on employees. Failing to get the right people on board and properly communicate what's changing can mean major hassles and headaches for the employer. From these real-life case examples, learn the best practices you need to know to successfully manage change initiatives and evolve your plan for the future.

Panelists: Matthew D. Pavelich, Senior Principal, Communication, Normandin Beaudry

Valerie Travis, Founder, Bespoke Benefit Solutions

Angeline Arsenault, Benefits Manager, Canada, SLB



Hotel Information

Delta Hotels Calgary Downtown

Rate: C\$239 single/double occupancy

Taxes and fees (subject to change): 3% destination marketing fee, 4% Alberta tourism levy, 5% GST

Reservation deadline: May 21, 2024

You will be charged a C\$400 deposit upon registration. Please specify your hotel requirements on the registration form.

Note: Hotel room availability is not guaranteed outside of scheduled program dates.

Location details:

Enjoy your stay in Alberta at Delta Hotels Calgary Downtown, a pet-friendly hotel that borders the river valley. From here, take a quick walk through downtown Calgary to the East Village and other nearby neighbourhoods to browse the city's many shops, restaurants and attractions. Explore the area using the +15 Skyway, available every weekday. Unwind at this redesigned, well-appointed and impeccably located hotel. Visit the onsite restaurant, The Shoe & Canoe Public House, and celebrate the best of Canada with approachable farm-to-table cuisine. Keep up with your workout routine at the hotel's 24-hour fitness centre and exercise floor, which includes an indoor pool, yoga room and on-demand fitness classes. Recharge in your hotel room or suite with no unnecessary clutter and amenities such as free Wi-Fi, 24-hour room service and expansive work desks.



Registration Fees

Employer/Plan Sponsor	Member	Nonmember
Through May 14, 2024	C\$ 995	C\$1,215
After May 14, 2024	C\$1,295	C\$1,515

Provider		
Through May 14, 2024	C\$1,295	C\$1,515
After May 14, 2024	C\$1,595	C\$1,815

Sponsored Attendee Tables Available

Invite your team to share the experience! Bring your clients and colleagues at a discounted rate. Email Diane at dianem@ifebp.org for information or to reserve a table.

Table of six: C\$6,000 (a \$7,700 value!)



Go to www.ifebp.org/EVOLVE to register.



EXHIBIT AND SPONSORSHIP OPPORTUNITIES

EVOLVE is all about engagement! Exhibit or sponsor EVOLVE and network with Canadian HR, pensions and benefits leaders.

Attendees will be seeking products and services for their organizations in the following categories:

- Benefits consulting
- Health insurance
- Wellness solutions
- Employee assistance programs
- Retirement solutions
- Investments/financial services
- Legal services.

Exhibit Tables Available—Showcase your brand and thought leadership with a tabletop exhibit!

Sponsorships—Options include tote bags, lanyards, networking receptions, session moderator and more. Includes a free or discounted conference registration.

Fantastic networking opportunity: Sponsor a table of six (6) and invite your clients and colleagues to be your guests at a discounted rate! C\$6,000 per table (a \$7,700 value).

For more information, contact:

Exhibits Julie Ichiba, jichiba@ifebp.org or (262) 373-7674

Sponsorships Diane Mahler, dianem@ifebp.org or (262) 373-7656

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within 3 days (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. For details, see www.ifebp.org/policies.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit with your registration for the program at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

Note: Requests made for CE credit do not guarantee administration of credit. For further information on CE credit, please call (262) 786-6710, option 2.



Educational sessions at this program can qualify for self-reported CEBS* Compliance credit. Visit www.cebs.org/compliance for additional information.



It's time to **EVOLVE.**

- Keynote: Beyond Demographics: How Valuegraphics Can Help You Understand Your Workforce
- Best Practices in Leadership and Culture: What Does It Take to Be a Top 100 Employer?
- Addressing the Benefit Needs of Women in the Workplace
- Winning the Marathon for Talent
- Plus "speed-dating-style" roundtables on hot topics

Register by May 14, 2024 to save!

Visit www.ifebp.org/EVOLVE to register, or call (833) 886-3749 for more information.



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