

HEALTH BENEFITS NATION

September 26-28, 2023 • The Royal Sonesta Houston Galleria • Houston, TX



JOIN YOUR PEERS leading HR and Benefits teams to exchange ideas, understand what works and what doesn't, and gain actionable solutions to control rising healthcare costs and improve outcomes



WALK AWAY WITH practical, evidence-based benefits purchasing strategies that you can implement in your organization and significantly impact the bottom line



INTEGRATE cost-effective, transparent, and direct-to-employer models into the plan design to save 10% or more on healthcare in year one



Transform Employee Health: Adopt Value-Driven, Affordable, and Inclusive Benefits

FEATURED SPEAKERS INCLUDE:

Mike Weiner, LMSW, Director, EY Assist
Ernst & Young (EY)

Stephanie Koch, Director of Human Resources
Hendry Marine Industries, Inc.

Rosa Novo, Executive Benefits Director
Miami-Dade County Public Schools

Monte Masten, MD, Chief Medical Officer
Marsh & McLennan Agency

Tracy Kofski Wittman, Vice President, Total
Rewards and People Analytics
KinderCare Learning Companies (KLC)

Validation Institute is recognized by SHRM to offer PDCs for SHRM-CP® or SHRM-SCP® recertification activities.

The Health Benefits Nation event qualifies for up to 15.5 PDCs.





**Personalized
Healthcare
Ecosystem**



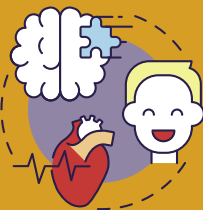
**Drug-Free
Pain Management**



Nutrition Impact



**Mental Health
At Work**



Holistic Approach

Who Should Attend

FROM PRIVATE AND PUBLIC SECTOR EMPLOYERS:

- Chief HR Officer
- Chief Medical Officer
- Chief Financial Officer
- Chief Wellness Officer
- SVPs, VPs, Directors, and Managers of:
 - Human Resources
 - Wellness/Well-Being
 - Benefits
 - Worksite Health and Safety
 - Rewards
 - HRIS
 - Employee Welfare
 - Employee Relations
- Wellness Coach
- EAP Coordinator
- Medical Director

FROM BENEFITS CONSULTING ORGANIZATIONS:

- Benefits Advisers
- TPAs
- Brokers
- Insurance Agents
- Stop-Loss Carriers
- Benefits Administrators

FROM HEALTH PLANS:

- Chief HR Officer
- Chief Medical Officer
- SVPs, VPs, Directors, and Managers of:
 - Health Promotion
 - Health Solutions
 - Employer Relations
 - Member Engagement
 - Employer Strategy and Engagement

FROM HOSPITAL AND HEALTH SYSTEMS:

- Chief HR Officer
- Chief Medical Officer
- Chief Wellness Officer
- SVPs, VPs, Directors, and Managers of:
 - Human Resources
 - Wellness
 - Benefits
 - Population Health Management
 - Operations
 - Prevention
- Medical Director
- Social Worker

This conference also convenes consultants and solutions providers who cater to the above audiences and help transform employer benefits.



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Top Reasons to Attend

Gain actionable insights from plenary discussions and focused track sessions including Whole-Person Health and Well-Being, Innovations in Self-Funding, and Benefits Adviser Leadership.

- 1** Join your peers leading HR and Benefits teams to exchange ideas, understand what works and what doesn't, and gain actionable solutions to control rising healthcare costs and improve outcomes
- 2** Move away from the fluff: Walk away with evidence-based benefits purchasing strategies that you can implement in your organization and significantly impact the bottom line
- 3** Integrate cost-effective, transparent, and direct-to-employer models into the plan design to save 10% or more on healthcare in year one
- 4** Navigate coverage for the new era of (expensive) weight-loss drugs such as Wegovy and Ozempic
- 5** Prepare for the Consolidated Appropriations Act (CAA) and meet your fiduciary obligation to audit solutions providers and ensure fair prices for high-quality healthcare services
- 6** Focus on advanced primary care to deliver the right care to your employees in a timely manner
- 7** Combat chronic conditions with a comprehensive and outcomes-driven approach including digital medicine, healthy eating, and lifestyle changes
- 8** Strengthen employer-provider partnerships to scale direct contracting models and enhance access to quality care
- 9** Engage in multi-stakeholder partnerships that empower purchasers to implement innovative models and break away from the status quo
- 10** Put words into action: Prioritize mental health to minimize health risks and reduce healthcare costs while improving workforce well-being

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Day One Tuesday, September 26	
8:00 AM – 6:30 PM	Registration Open
9:00 AM – 1:00 PM	<p>Deep-Dive Workshop: Employer Fiduciary Training (Lunch Included for Participants)</p> <p>Several lawsuits have been filed over the past few months against carriers by parties demanding access to their health plan’s claims data, and on February 23, 2023 the Department of Labor (DOL) issues further guidance on the removal of “gag” clauses, meant to facilitate such access, including where and how to file attestations and instructing plans to report carrier noncompliance to its enforcement division. Navigating your Healthcare Plan under the new requirements and transparency has opened the door for huge cost savings for the plan and the participants but ignored, there are significant liabilities.</p> <p>The Consolidated Appropriations Act of 2021 (CAA) is the most significant compliance challenge employers have encountered since the 2009 enactment of the Affordable Care Act, aka Obamacare. Yet not many are talking about it. This course offers a comprehensive educational program consisting of a certification program for CEO, CFOs, business owners, benefits specialists or other employer fiduciaries tasked with oversight of the plan. Classroom session is hands-on, peer to peer inter-active and forward thinking, using subject experts to facilitate the discussions. The curriculum is informative and relevant, covering essential areas pertaining to the healthcare plan and the new fiduciary duties and responsibilities plan sponsors now have.</p> <p>The storm is here, and employers, sick of paying more each year in exchange for less, are determined to get healthcare costs under control. The mission of this half day course is to establish a foundation for a prudent process that will reduce organizations liabilities by engaging in conversation of management and oversight of employer sponsored healthcare plan.</p> <p>The prudent employers will be at the table and the imprudent are on the menu as litigation and enforcement ramp up.</p> <p>In this Deep Dive Workshop, you will learn:</p> <ul style="list-style-type: none"> • What employers are required to do under the CAA • How to run a Fiduciary Procurement Process on your healthcare plan • How to reduce your liabilities, implement cost containment and enhance benefits on your healthcare plan <p><i>Jaime Greenleaf, Co-Founder, My Fiduciary Coach</i> <i>Hugh O’ Toole, Chief Executive Officer, Innovu</i> <i>Jim Arnold, CPA, CFA, CFE, Founder and Chief Executive Officer, finHealth</i> <i>Jeff Greene, Chief Executive Officer and Founder, MedEncentive</i> <i>Julie Selesnick, Senior Counsel, Healthcare and Employee Benefits Groups, Berger Montague</i> <i>Mike Miele, FSA, MAAA, Senior Vice President, Insured Services, Capital Rx</i> <i>Josh Spivak, Chief Executive Officer, Highlight Health</i></p>
1:00 PM – 2:00 PM	Main Event Registration
2:00 PM – 2:15 PM	Conference Welcome and Chairperson’s Opening Remarks
2:15 PM – 3:15 PM	<p>Navigating the Future of Work</p> <ul style="list-style-type: none"> • Managing workforce well-being in a post-covid world • Examining the impact of hybrid work on health and well-being • Exploring innovative ways to meet the needs of the younger generation • Creating a culture of health, well-being, and inclusivity <p><i>Mike Weiner, LMSW, Director, EY Assist, Ernst & Young (EY)</i></p>

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3:15 PM – 4:15 PM	<p>From Imagination to Reality: A SMART Network Approach to High-Value Health Benefits Purchasing</p> <ul style="list-style-type: none"> • Creating a consumer friendly, easy-to-use benefit plan with high consumer satisfaction, lower cost, and improved clinical quality • Leveraging Population Health Service Organizations (PHSOs) to create a self-funded “Smart Network” EPO benefit structure with limited cost-sharing for employees • Assessing the impact of new transparency tools, legislation, and regulations to provide the knowledge, power, and responsibility to act • Integrating Advanced Primary Care to reduce cost of care by 25% <p><i>Ken Janda, Chief Executive Officer, Wild Blue Health Solutions</i> <i>Dan Burke, Vice President, Corporate Benefits, Turner Industries, LLC</i> <i>Sue Prochazka, Independent Consultant (former benefits consultant and HR Director)</i> <i>Chris Skisak, Executive Director, Houston Business Coalition Health</i> <i>Moderator: Josh Berlin, Chief Executive Officer, rule of three, LLC</i></p>
4:15 PM – 5:15 PM	<p>Balancing the Digital Dichotomy: Leverage Virtual Technology to Bring Care Closer to Employees</p> <ul style="list-style-type: none"> • Navigating digital boom to proactively engage employees in their health and well-being and improve outcomes • Transforming the healthcare experience with digital health and virtual care without compromising on the human touch • Utilizing real-time patient data to personalize care and better manage chronic conditions • Adopting a comprehensive approach to realize the full potential and value of digital health services for employees <p><i>Dan Shields, Vice President of Corporate Accounts, Digital Medicine, Ochsner Connected Health</i> <i>Monte Masten, MD, Chief Medical Officer, Marsh & McLennan Agency</i></p>
5:15 PM – 6:30 PM	Opening Night Reception
Day Two Wednesday, September 27	
7:00 AM – 6:45 PM	Registration Open
7:30 AM – 8:30 AM	Morning Coffee
8:30 AM – 8:35 AM	Chairperson Remarks
8:35 AM – 9:25 AM	<p>Harnessing the Power of Advanced Primary Care to Sustain Health Improvements and Deliver High-Quality Care</p> <ul style="list-style-type: none"> • Using advanced primary care to offer evidence-based, equitable, and affordable care to employees • Understanding the employer’s role in redirecting healthcare spend to primary care and focusing on proactive vs. reactive healthcare • Investing in the right data and technology to optimize care delivery <p><i>Justin Jolls, Compensation and Benefits Manager, McKee Foods</i> <i>Patty Roberts, MD, Regional Medical Director and Vice President, Medical Operations, Premise Health</i> <i>Moderator: Jeffrey Hogan, President, Upside Health Advisors</i></p>

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<p>9:25 AM – 10:15 AM</p>	<p>Weighing the Consequences: Navigating Coverage for GLP-1 Drugs</p> <ul style="list-style-type: none"> • Making informed decisions about GLP-1s: Key questions to ask • Prioritizing education, coaching, and precertification to determine eligibility for GLP-1s • Finding the balance between using weight loss medication and focusing on nutrition, diet, and lifestyle changes <p><i>Deborah Ault (Nurse Deb), Founder and President, Ault International Medical Management (AIMM)</i> <i>Moderator: Al Lewis, Founder, Quizzify</i></p>
<p>10:15 AM – 10:55 AM</p>	<p>Coffee and Networking Break</p>
<p>11:00 AM - 11:45 AM</p>	<p>Cutting Down Medical Expenses with a Value-Driven Health Plan Strategy</p> <ul style="list-style-type: none"> • Discuss key considerations to implement a value-driven health plan <ul style="list-style-type: none"> ○ Learn how a value-driven health plan can help organizations effectively manage rising employee healthcare costs • Gain insight into how KinderCare saved 25% on medical expenses lowering employee out-of-pocket costs, promoting price transparency, and enabling broader total reward investments • Review KinderCare’s approach to elevating the plan experience <ul style="list-style-type: none"> ○ Leverage data, technology, and member centric tools to elevate engagement • Optimize total rewards strategy by reinvesting medical spend in other areas such as wages and subsidized childcare <p><i>Matt Champa, Vice President, Health Solutions Consulting Practice, Aon</i> <i>Tracy Kofski Wittman, Vice President, Total Rewards and People Analytics, KinderCare Learning Companies (KLC)</i></p>
<p>11:45 AM – 3:20 PM</p>	<p>CONCURRENT TRACK SESSIONS</p>
	<p>11:45 AM – 12:30 PM Whole-Person Health and Well-Being Track</p> <p>Destigmatize and Personalize: Effective Approaches to Improve Behavioral and Health Outcomes</p> <ul style="list-style-type: none"> • Normalize mental health-related conversations in the workplace: Examine senior leadership’s role in eliminating the stigma around addressing mental health issues • Implement a concierge-based program to manage and treat conditions including substance-use disorders, addiction, and depression • Leverage digital tech and virtual care apps to equip employees with appropriate resources and offer support in a timely manner
	<p>11:45 AM – 12:30 PM Shared Session Between Innovations in Self-Funding Track and Benefits Adviser Strategy Track</p> <p>Reimagining the Employee Health Experience with AI and Technology</p> <ul style="list-style-type: none"> • Leverage technology to simplify health benefits experience for employees and bend the cost curve • Remove complexities around understanding health and wellness benefits to increase plan utilization, make optimal healthcare decisions, and eliminate unnecessary spend • Adopt a data-driven strategy to provide timely support, access to resources, and guidance tailored to an individual’s specific needs • Empower employees to take control of their health and well-being by connecting them to quality care at the right time

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	<p><i>Guy Benjamin, Chief Executive Officer and Co-Founder, Healthee</i> <i>Sheila Krueger, Benefits Leader, Former Head of Global Benefits, Zoom</i></p>
12:30 PM – 1:45 PM	Lunch
	<p>1:50 PM – 2:35 PM Whole-Person Health and Well-Being Track</p> <p>New Pathways for Chronic Care: Improving Management of and Support for Chronic Health Conditions</p> <ul style="list-style-type: none"> • Gain strategies to support individuals with chronic conditions throughout their healthcare journey • Understand the impact of chronic conditions on an individual’s mental health and well-being <ul style="list-style-type: none"> ○ Address chronic issues to see improvements in behavioral health • Proactively communicate with and engage individuals with digital technology and virtual care • Adopt a comprehensive and evidence-based chronic condition management strategy by providing timely access to resources, health coaches, medication, and health support • Leverage medical and SDoH data to identify specific needs, tailor care, and enhance access <p><i>Rosa Novo, Executive Benefits Director, Miami-Dade County Public Schools</i> <i>Ryan Grant, MD, Chief Executive Officer and Founder, Vori Health</i></p>
	<p>1:50 PM – 2:35 PM Innovations in Self-Funding Track</p> <p>Strategic PBM Spend: Adopt an Outcomes-Based, Patient-Focused Drug Purchasing Strategy</p> <ul style="list-style-type: none"> • Discuss the shifting PBM landscape driven by the converging forces of CAA and new legislation that prioritize transparency • Examine actionable strategies to curb rising drug spend, eliminate waste in prescription medication, and lower out-of-pocket costs • Identify approaches to adopt a value-driven pharmacy strategy • Learn how to effectively choose the right medication that positively impacts an individual’s health and well-being, promotes adherence, and significantly improves outcomes <p><i>Josh Golden, Senior Vice President, Strategy, Capital Rx</i></p>
	<p>1:50 PM – 2:35 PM Benefits Adviser Strategy Track</p> <p>Driving Affordable, High-Quality, and Transparent Healthcare With a Direct Contracting Strategy</p> <ul style="list-style-type: none"> • Move away from the current health insurance environment and identify opportunities to control/sustain costs while enhancing benefits • Implement a fair price model to promote transparency in the marketplace and eliminate surprise billing issues • Understand how employers can establish robust provider partnerships for services including primary care and diagnostic medical care to improve outcomes • Hear experiences, challenges, lessons learned, and the value - quantitative and qualitative - received by adopting a direct contracting model <p><i>Cristin Dickerson, MD, Founding Partner, Green Imaging</i></p>

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	<p>2:35 PM – 3:20 PM Shared Session Between Whole-Person Health and Well-Being Track and Benefits Adviser Strategy Track</p> <p>Outlook on Virtual Primary Care to Contain Costs and Improve Outcomes</p> <ul style="list-style-type: none"> • Adopt an integrated virtual primary care strategy to enhance value • Leverage mobile apps to personalize an individual's healthcare journey and offer right support, guidance, and navigation in a timely manner • Learn how a virtual care benefit can save employers up to 45% in unnecessary ER and doctor visits <p><i>Wayne Orchard, Partner and Executive Vice President, Lyric</i> <i>Herschel Head, Chief Executive Officer, Business Foundry LLC</i> <i>Dan LaBroad, Chief Executive Officer, Ovation Health & Life Services</i></p>
	<p>2:35 PM – 3:20 PM Innovations in Self-Funding Track</p> <p>Making the Impossible Possible: How HR Can Be Healthcare Changemakers</p> <ul style="list-style-type: none"> • Hear practical tips for HR executives to drive change in their organization by bending the cost curve • Know the right questions to ask brokers and solutions providers to ensure transparency and quality • Understand the importance of HR and CFO collaboration to combat rising healthcare costs <ul style="list-style-type: none"> ○ Learn how Hendry Marine saved 5.5 million dollars in their claims cost by implementing a RBP model while preventing health plan rate increases for their employees <p><i>Stephanie Koch, Director of Human Resources, Hendry Marine Industries, Inc.</i></p>
3:20 PM – 3:50 PM	Coffee and Networking Break
3:55 PM – 4:55 PM	Making the Right Choices: Transforming Employers into Smart Consumers
4:55 PM – 5:40 PM	<p>Less Talk More Action: Employer's Role in Accelerating Health Equity</p> <ul style="list-style-type: none"> • Discuss the value of multi-stakeholder community initiatives that benefit employers, employees and their families, and communities • Leverage partnerships to address the root causes and contributing factors of poor health outcomes <ul style="list-style-type: none"> ○ Improve health equity and community health and increase economic growth • Learn about a current employer-community equity-based initiative pilot that serves as a template for other efforts • Deepen business engagement in evidence-based, community-centered health initiatives to build a healthier workforce and create sustainable and equitable models for addressing non-medical drivers of health <p><i>Ericka Brown, MD, Division Director, Harris County Local Health Authority</i> <i>Andrea Caracostis, MD, Chief Executive Officer, HOPE Clinic</i> <i>Megan Rose, Senior Director, Strategic Initiatives, Center for Houston's Future</i> <i>McClain Sampson, PhD, Associate Professor; Research Fellow, University Houston-Graduate College of Social Work (GCSW); Baker Institute for Public Policy, Rice University</i> <i>Chris Skisak, Executive Director, Houston Business Coalition Health</i></p>
5:40 PM – 6:40 PM	Networking Reception

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Day Three Thursday, September 28	
7:30 AM – 12:30 PM	Registration Open
8:00 AM – 8:45 AM	Morning Coffee
8:50 AM – 9:00 AM	Chairperson Remarks
9:00 AM – 9:45 AM	<p>Unlocking Innovations in Pain Management and Care</p> <ul style="list-style-type: none"> • Putting an end to the chronic pain epidemic with digital health: Where are we today? <ul style="list-style-type: none"> ○ Hear perspectives on how virtual physical therapy can effectively treat patients with pain-related issues and drive outcomes improvement • Examine non-opioid medication and therapies for long-term pain management • Personalize treatment based on real-time data to enhance engagement and adherence <p><i>Speaker TBA</i></p>
9:45 AM – 10:30 AM	<p>The Future of Health is Food (as a Benefit)</p> <ul style="list-style-type: none"> • Analyze the intersection of health and nutrition to combat-diet related diseases • Discuss how food can drive the shift from sick care to preventive care • Learn how employers can integrate access to healthy food within their benefit strategy • Evaluate the impact of tailored meals to lower health risks, reduce disease progressions, and significantly improve health and well-being <p><i>Speaker TBA</i></p>
10:30 AM – 11:00 AM	Networking Break
11:00 AM – 11:45 AM	<p>Interactive Roundtables: End your tailored learning with focused, peer discussions to collaborate and take workable strategies back to your organizations.</p> <ul style="list-style-type: none"> • ROUNDTABLE A: Making an Impact: Prioritize Inclusive and Equitable Benefits to Empower Employees • ROUNDTABLE B: Innovative Partnerships to Manage Medical Trend High-Cost Claimants • ROUNDTABLE C: Engaging Employees in their Mental Health Using Digital Technology • ROUNDTABLE D: Efforts to Promote and Improve Health Literacy Among Employees
11:45 AM - 12:30 PM	<p>Employers Speak Up: Demanding Transparency to Fix the Cost and Quality Problem</p> <ul style="list-style-type: none"> • Discuss actions employers can take today to fix a broken healthcare delivery system and control costs • Gain insights on key partnerships that will empower purchasers to implement innovative models and break away from the status quo <p><i>Rosa Novo, Executive Benefits Director, Miami-Dade County Public Schools</i> <i>Stephanie Koch, Director of Human Resources, Hendry Marine Industries, Inc.</i></p>
12:30 PM	Health Benefits Nation – Main Event Concludes

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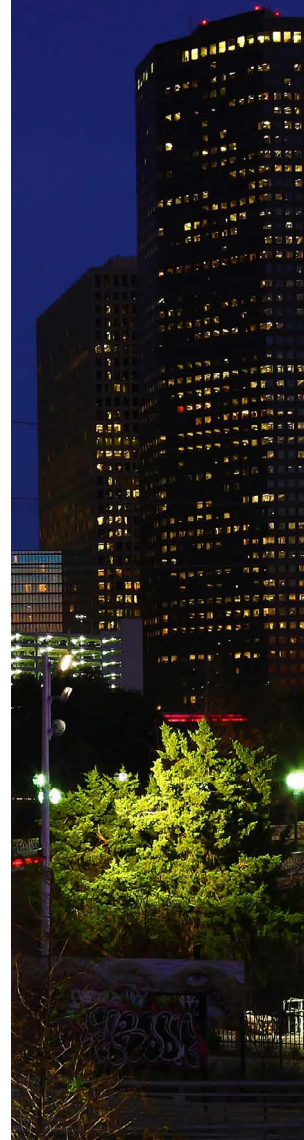
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Holly Lee | 781-939-2625 | Holly.Lee@validationinstitute.com



Registration & Hotel Info

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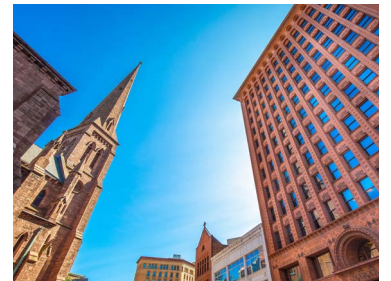
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- Networking breaks and receptions
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** All registrations subject to review by the Validation Institute team. Promo codes not applicable for government rates or vendors/solutions providers. Discount codes are only applicable to NEW registrations.*

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 2222 West Loop South
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Book by September 4, 2023



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