Construction Industry Benefits Conference
September 23-24, 2019
The Westin Copley Place Boston
Boston, Massachusetts

Register by August 12 to SAVE $300!

www.ifebp.org/construction

International Foundation
of Employee Benefit Plans
Education | Research | Leadership
# Construction Industry Benefits Conference

**September 23-24, 2019**  
The Westin Copley Place Boston  
| Boston, Massachusetts

## PROGRAM AT A GLANCE

### Monday, September 23, 2019

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<th>Time</th>
<th>Session</th>
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<tr>
<td>8:00-9:15 a.m.</td>
<td>Changing Benefit Designs for Changing Demographics in Construction</td>
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<td>9:30-10:45 a.m.</td>
<td>Legislative Update</td>
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| 11:00 a.m.-12:15 p.m. | Retirement Plan Developments in Construction  
|                  | Health Care in Construction Industry Plans                                               |
| 1:15-2:30 p.m.   | Construction Industry Drug Testing                                                       |
| 2:45-4:00 p.m.   | Opioid Crisis                                                                             |

### Tuesday, September 24, 2019

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| 11:00 a.m.-12:15 p.m. | Fund Mergers—Case Study (Part 2)  
|                  | Fund Office Structure—Trustee Relationships With Professionals                            |
| 1:15-2:30 p.m.   | Investment Strategies                                                                     |
| 2:45-4:00 p.m.   | Roundtable Discussion                                                                     |
The Construction Industry Benefits Conference offers a unique opportunity to gather with those who face similar challenges in your industry. This conference is designed to provide a forum for examining the latest trends, sharing experiences and solutions, reviewing legislative and regulatory changes, and considering the most effective strategies for delivering benefits to participants in the construction industry. Join trustees, administrators and plan professionals to tackle the administrative and strategic benefits issues of today and tomorrow.

Who Should Attend

- New and experienced trustees who serve on building trade health and pension funds
- Fund office administrative staff and key personnel
- Professionals serving the construction industry, including attorneys, accountants, consultants and service providers
- Apprenticeship training fund trustees and coordinators

Key Takeaways

- Learn from your peers who face similar challenges on what has and has not worked in the construction industry.
- Discover the latest trends.
- Hear from experts on what best practices are being implemented.
- Understand how the latest regulatory changes and legislative initiatives will impact your operation.

Visit www.ifebp.org/construction to register today.
Construction Industry Benefits Conference
September 23-24, 2019

SUNDAY, SEPTEMBER 22, 2019
4:00-6:00 p.m.
Registration Open

MONDAY, SEPTEMBER 23, 2019
7:00-8:00 a.m.
Registration and Continental Breakfast

8:00-9:15 a.m.
Changing Benefit Designs for Changing Demographics in Construction

Recruitment of new members into the construction industry is always a challenge, especially given our increasingly multigenerational workforce. This session will focus on the unique needs of working with different segments of the population, including Millennials, as well as how to implement different strategies and tactics to gain diversity. Topics include:

- Generational issues
- Diversity issues—Gender, age, race, LGBT
- Recruitment and retention
- Benefits packages that affect recruitment and retention
- Challenges related to health plans and retirement plans.

9:30-10:45 a.m.
Legislative Update

There has been a flurry of legal and legislative activity in recent months that has affected your benefit funds. This session will provide an overview of those legislative and regulatory changes in health care and retirement benefits that may impact your plan moving forward. Key areas of discussion include:

- Health
  - ACA
  - HRA regulations
  - Personal account plan rules
  - Approval of big health mergers
- Pension
  - The political aftermath of the Joint Congressional Select Committee
  - New challenges to funding retirement plans.
MONDAY, SEPTEMBER 23, 2019 (Continued)

11:00 a.m.-12:15 p.m. Concurrent Sessions

Retirement Plan Developments in Construction

Retirement security remains a big issue. This session will examine the latest developments in retirement plans for the construction industry and consider:

- Hybrid plans
- DB/DC
- Withdrawal liability
  - Definition of construction industry plan exemption
- Assumptions
  - Mortality and discount rates.

Health Care in Construction Industry Plans

Health care has continued to be a heated political debate, and how it’s provided to members is crucial to the stability of your plan. Discussion in this session will focus on the current status of health care delivery and how these changes may impact health plans in the construction industry, including:

- Coalitions
- Reciprocal rules for your plan
- Eligibility standards
  - Hour vs. dollar bank
  - Hybrid
  - Spousal coverage
- Non-bargained participants.

12:15-1:15 p.m.

Luncheon
Construction Industry Benefits Conference

September 23-24, 2019

MONDAY, SEPTEMBER 23, 2019 (Continued)

1:15-2:30 p.m.
Construction Industry Drug Testing

According to governmental research, the construction industry has one of the highest rates of drugs and alcohol abuse. Ensuring the safety of your construction sites is a top priority, and drug testing programs are a key part of that process. This session can help provide tips for how to evaluate construction industry drug testing, and it will cover:

- Rx benefits
- State legalization of recreational marijuana
- What do the drug testing policies and procedures look like now?
- Safety issues on the worksite
- Who is covering the cost of testing?

2:45-4:00 p.m.
Opioid Crisis

Despite our best efforts, opioid use continues to rise at an alarming rate. It impacts our communities, workplace and families, but there are things we can implement in our plans to help. This session will discuss:

- Your health plan’s treatment options
- How to avoid paying for the scam treatment options
- Pain management and alternative treatments
- Prevention strategies
- Understanding what your carriers offer
- Effects of management—Unintended consequences.
TUESDAY, SEPTEMBER 24, 2019

7:00-8:00 a.m.
Registration and Continental Breakfast

8:00-9:15 a.m.
Communicating Value of Benefits to Your Workforce

As the delivery of benefits has become more complex, it is critical that you clearly and effectively communicate with your members and participants. This is especially true in the construction industry where all of your participants are not typically in one common location. This session will focus on the most effective communication strategies to implement for your plan, including:

- Marketing to non-union workers
- Marketing and education to your participants
  - Behavioral decision making
- Recruiting diversity—Gender, age, race
- Generational issues.

9:30-10:45 a.m.
Fund Mergers—Nuts and Bolts (Part 1)

Given the trend of consolidations that have occurred in recent years, it is important to understand the basics of fund mergers. Look at the challenges of combining funds and how to move beyond the internal politics in a session that will provide information on how to implement a smooth merger process should you face one in the future. Topics include:

- Why or why not?
- How do you do it and how to approach it
- The internal politics of mergers
- What creates a good merger
- Retirement vs. health plan mergers.
TUESDAY, SEPTEMBER 24, 2019 (Continued)

11:00 a.m.-12:15 p.m. Concurrent Sessions

Fund Mergers—Case Study (Part 2)

Knowing the basics of fund mergers is one thing, seeing how they work in action is another. In this session, we will dive into the specifics of fund mergers with a case study that serves as a lesson in what happens when basic knowledge is put to the test.

- Economic necessity
- Strategic necessity

Fund Office Structure—Trustee Relationships With Professionals

One of the most important factors in running an efficient benefit plan is understanding the relationships that trustees have with their professional team. This session will cover the typical challenges trustees face in understanding the fund office structure and how to work with professionals to meet your objectives.

Topics include:

- Contract vs. salary administrators
- Role of the relationship between the two
- Meaningful plan management tools
- Relationships with other professional providers
  - RFPs
  - Role at board meetings.

12:15-1:15 p.m.
Luncheon

1:15-2:30 p.m.
Investment Strategies

One of the most pressing challenges for any benefit plan is to maintain financial stability. This session will provide guidance on how to get the most out of the market so that you can make the best investment choices you can for your pension, health and welfare and training benefit funds. Topics include:

- Infrastructure
- ESG—Environmental, Social, Governance Investing
- Communicating effectively with your investment professional
- Differences between health and retirement investing.
2:45-4:00 p.m.
Roundtable Discussion

This session will include a panel of professionals who will address topics covered in the sessions alongside topics submitted by the audience throughout the conference. It is a perfect opportunity to share war stories and learn of the successes and challenges of others.
In this economic, legal and regulatory environment, you cannot afford to ignore your collections program. The Collection Procedures Institute is designed to provide the practical information you need to fulfill your fiduciary obligation to collect payments. Collections are a critical and complex process that affects the overall financial health of your fund. Register for this conference to hear expert professionals and practitioners share trends, legal and legislative updates, and best practices so you can benchmark your policies and procedures and network with others who share similar challenges.

**Who Should Attend**

- Multiemployer trustees
  - Labor and management
  - Small and large funds
  - All industries
- Payroll auditors and collection coordinators
- Certified public accountants
- Attorneys
- Administrators
  - Salaried and third-party administrators
  - Administrative staff

**Key Takeaways**

- Understand the collections process.
- Learn effective strategies and trends from experts and practitioners.
- Hear how recent key legal decisions impact your plans.
- Best practices to implement
- Sample documents, checklists and other prototypes
- Networking and interactive sessions allow you to learn from your peers.

Visit [www.ifebp.org/collections](http://www.ifebp.org/collections) to register today.

The Construction Industry Benefits Conference and Collection Procedures Institute are held consecutively so you can make the most of your time away. Use discount code CONST19 when registering for both to save $300.
Hotel Information

The Westin Copley Place Boston
Boston, Massachusetts

The Construction Industry Benefits Conference is being held at The Westin Copley Place Boston in Boston, Massachusetts. Recently renovated, The Westin Copley Place Boston includes beautifully appointed guest rooms and suites and is situated in the heart of historic Back Bay. Explore places near the hotel including Faneuil Hall, Fenway Park, the shops and dining options on Newbury Street, as well as Back Bay’s historical attractions.

The International Foundation has secured a reduced room rate of $309 for a single/double room for our conference attendees. To receive the conference rate, you must book your room through the International Foundation by specifying your hotel needs on your registration form. The reservation deadline is August 19, 2019.

Boston

Fun by land and fun by sea, Boston, Massachusetts is an active, vibrant city with something for everyone. From the charming cobblestones of Beacon Hill, to the civic landmarks along the Freedom Trail, to the iconic grounds of Harvard University and Fenway Park, Boston is a treasure trove of Americana. Explore diverse neighborhoods, shop at chic boutiques and high-end malls, fall into a foodies’ paradise and discover the true essence of Boston, a cosmopolitan hub where tradition and innovation interact every day.

Travel and Entertainment

Most major airlines fly into Boston Logan International Airport (BOS). Visit https://www.boston.gov/visiting-boston for information on Boston area attractions, dining, shopping, nightlife, golf and more.
Sponsorship Opportunities

The Construction Industry Benefits Conference provides a perfect opportunity for service providers to increase their brand exposure while networking with new and experienced trustees and administrators who serve on building trade health and pension funds. Three levels of event sponsorship are available, each with its own distinct bonus rewards, **including complimentary or discounted registrations**, recognition on event signage and on-site materials, company listing on the International Foundation website, listing in the sponsor guide provided to all attendees and more. For more information on this conference and **the new sponsorship opportunities** for 2019 please contact Diane Mahler at dianem@ifebp.org or (262) 373-7656.
The International Foundation provides more than just objective conferences. Turn to the International Foundation for timely and relevant news, education and information. Check out some of our most popular resources below.

**Trustee Resource Center**  
[www.ifebp.org/trusteeresource](http://www.ifebp.org/trusteeresource)  
Find the information you need as a trustee regarding your fiduciary duties and responsibilities.

**ACA University**  
[www.ifebp.org/acau](http://www.ifebp.org/acau)  
An educational resource covering the latest must-know ACA information for employers. The virtual environment contains live webcasts, discussions, resources, frequently asked questions and sample documents to help you implement ACA regulations.

**Financial Education/Retirement Security**  
[www.ifebp.org/retirementsecurity](http://www.ifebp.org/retirementsecurity)  
Recent news and timely resources on the future of retirement and financial literacy.

**Apprenticeship Resources Web Page**  
[www.ifebp.org/apprenticeshipresources](http://www.ifebp.org/apprenticeshipresources)  
News, survey data and case studies pertaining to changes in training and apprenticeship trust fund legislation.

**NEW MEMBER BENEFIT—Apprenticeship Program Answer Guide**  
[www.ifebp.org/guide](http://www.ifebp.org/guide)  
This exciting new online resource is designed to be a quick reference for apprenticeship program coordinators, trustees and directors, and other interested constituents whenever a question arises. With a focus on practicality, the guide addresses apprenticeship program topics from top to bottom, with subjects ranging from recruiting to audits to trends and more.

View all the resources we have to offer our members at [www.ifebp.org/membership](http://www.ifebp.org/membership).
REGISTRATION INCLUDES
Continental Breakfasts • Luncheons • Beverage Breaks

CONTINUING EDUCATION CREDIT
Programs sponsored by the International Foundation of Employee Benefit Plans are consistently accepted for credit by agencies governing continuing education for license renewal and professional recertification. Please note that preapproval by the governing agency is sometimes necessary. It is important, therefore, to register at least 60 days prior to the program taking place.

Note: Requests made for continuing education credit do not guarantee administration of credit.

For further information on continuing education credit, please call (262) 786-6710, option 2 or email continuinged@ifebp.org.

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

POLICIES
New cancellation policies effective for 2019 education programs. 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 and the 2019 policy, see www.ifebp.org/policies.

RELATED READING

Payroll Audit/Collections Combo
Payroll Auditing: A Guide for Multiemployer Plans
Second Edition
by Lawrence R. Beebe and Philip Vivirito
This easy-to-read guide to the payroll audit process is considered the payroll audit bible, with a wealth of practical information and advice on how to conduct payroll audits and audit programs that are both effective and cost-efficient.

Collecting Employer Contributions:
The ERISA Litigation Guide
by Travis J. Ketterman
Use this step-by-step guide to filing a collections suit under ERISA. Trustees will appreciate the plain English used to explain the collection process. Trust fund attorneys will value the practical pointers that can help increase the likelihood of a positive outcome. The appendix contains nearly 200 pages of sample legal forms and other model documents common to the collection of employer contributions.

Item #7303K. $80 (Members: $45). (Price includes shipping and handling.)
To order, visit www.ifebp.org/books.asp?7303K.
Construction Industry Benefits Conference/Collection Procedures Institute

Attendee Information (Please print clearly)  |  Source code 1910 B B1

Individual ID# or CEBS® ID#  
Full first name   M.I.   Last name  
Employer  
Title  
Address  
City  State/Province  Country  ZIP/Postal code  
Phone  
Business  Home  Mobile  
Email  

Form completed by  
Phone  

Not a Member? Join Now and Save! Visit www.ifebp.org/join for current rates.

- Individual $325  
- Organizational $1,050

Registration Information

Bill to organization name  
Bill to organization ID #  
Badge name  Badge title  
Special assistance—specify  
Special dietary requirements—specify

- Attend Both Programs for One Low Price  
Discount Code Const19

- Construction Industry Benefits Conference
  September 23-24, 2019 | Boston, Massachusetts
  Until August 12  
  Member fee  $2,200  Nonmember fee  $2,640
  After August 12  
  Member fee  $2,800  Nonmember fee  $3,240

- Collection Procedures Institute
  September 25-26, 2019 | Boston, Massachusetts
  Until August 12  
  Member fee  $1,250  Nonmember fee  $1,470
  After August 12  
  Member fee  $1,550  Nonmember fee  $1,770

- Hotel
  Reservation Deadline: August 19, 2019  
  Include $400 hotel deposit.
  The Westin Copley Place Boston—$309 single/double
  # of Adults  # of Children  
  □ King bed  □ Two beds
  Arrival date  Departure date  Special requests—describe

Continuing Education Credit

The International Foundation will apply for CE credit based on requests indicated below.

- Actuary  
- Attorney  
- CFP  
- CIMA  
- CPA  
- HRCI  
- Insurance producer*
- SHRM  
- Other, specify

Licensed in the state(s) of  License/NPN/BAR/CPA #  

*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit. NOTE: Requests made for CE credit on this form do not guarantee administration of credits.

Payment Must Accompany Order

New! Policies have changed. See www.ifebp.org/policies.
Make check payable to International Foundation.

- Check #  $  
- Credit card #  
- Exp. date  
- Cardholder’s name (print)

Registration/Order Summary

- Membership fee  
- Conference fee  
- Hotel deposit ($400)  
- Total (U.S. funds) $  

www.ifebp.org  Secure fax  [262] 364-1818  International Foundation  P.O. Box 89954,  Chicago, IL 60695-9954  Questions, email edreg@ifebp.org, or phone (888) 334-3327, option 2.

CEBS Compliance—Visit www.cebs.org/compliance for additional information.
Sessions Include

• Changing Benefit Designs for Changing Demographics in Construction
• Legislative Update
• Retirement Plan Developments in Construction
• Health Care in Construction Industry Plans
• Construction Industry Drug Testing
• Opioid Crisis
• Communicating Value of Benefits to Your Workforce
• Fund Mergers—Nuts and Bolts (Part 1)
• Fund Mergers—Case Study (Part 2)
• Fund Office Structure—Trustee Relationships With Professionals
• Investment Strategies
• Roundtable Discussion

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