Benefit Communication and Technology Institute
July 23-24, 2018
The Benson, a Coast Hotel | Portland, Oregon

The Benson, a Coast Hotel | Portland, Oregon

**Program at a Glance**

<table>
<thead>
<tr>
<th>Monday, July 23, 2018</th>
<th>8:00-9:15 a.m.</th>
<th>The Evolution of Communication—Yesterday, Today and Tomorrow</th>
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<tbody>
<tr>
<td>9:30-10:45 a.m.</td>
<td>Building a Strategic Plan for Your Communications Program—Single Employer and Public Sector Plans</td>
<td>Building a Strategic Plan for Your Communications Program—Multiemployer Plans</td>
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<tr>
<td>1:45-3:00 p.m.</td>
<td>Communications and Fiduciary Responsibility in the U.S.</td>
<td>Playing Nicely in the Communications Sandbox—the Canadian Legal Landscape</td>
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Most sessions were designed to address the common elements of communicating benefits in the United States and Canada. Where noted, sessions will address the differing legal and regulatory environment in each country.

- **General sessions**
- **U.S.–specific sessions**
- **Canadian-specific sessions**
Advancements in technology and data analytics have changed the way we live, engage and communicate. It’s not easy to penetrate the clutter of our connected society, especially when addressing benefits issues. The Benefit Communication and Technology Institute is for you if you have a role in communicating your organization’s employee benefit plans. Whether you are responsible for designing and implementing your organization’s communication program or you interact with plan participants about their benefits, this interactive and hands-on learning experience will help you understand the key issues involved in communicating with participants, current trends, legal requirements and best practices in communicating benefits.

You are encouraged to bring samples of your communications so you can evaluate them throughout the conference and share with others.

Register today at www.ifebp.org/benefitcomm.

**Key Takeaways**

- Develop a comprehensive strategy for your communications.
- Understand the value of data analytics.
- Listen to your stakeholders.
- Discover how technology can aid in your communications.
- Understand the key issues and trends impacting the industry.
- Network with other professionals facing similar challenges.
- Engage in productive dialogue, and come away with creative ideas and workable solutions.

**Who Should Attend**

Those responsible for communicating employee benefits in the United States and Canada, including:

- Corporate human resources and benefits directors and managers
- Trustees and administrators of multiemployer plans
- Public sector benefits managers and staff
- Administrative staff
- Communications managers and consultants.

The International Foundation has designated this conference as a “green” program. Accordingly, efforts to eliminate waste and reduce the amount of paper distributed will be in place. Program handouts will be available for download three business days before and 60 days after the program, should you desire to print. Alternatively, you may wish to download the materials in advance of the conference to your laptop, tablet or other mobile device for viewing during the sessions.
Benefit Communication and Technology Institute

SUNDAY, JULY 22, 2018
4:00-6:00 p.m.
Registration and Information

MONDAY, JULY 23, 2018
7:00 a.m.-4:30 p.m.
Registration and Information
7:00-8:00 a.m.
Continental Breakfast

8:00-9:15 a.m.
The Evolution of Communication—Yesterday, Today and Tomorrow
How we communicate has radically changed over the years due in large part to technological advancements. The radical differences in how people engage and the rapid pace of change require those charged with communicating benefits to listen, gather data, plan and execute outreach with precision, creativity and efficiency to cut through the clutter of our daily lives. This session will focus on:
• Evolution of communication
• The role of technology
• Change management
• Best practices to stay ahead of the curve.

9:30-10:45 a.m.
Concurrent Sessions
Building a Strategic Plan for Your Communications Program—
Single Employer and Public Sector Plans
This session will help you hone in on the key elements of building your own comprehensive and effective strategic plan, including:
• Strategic planning process and components
• Your value proposition
• Branding and messaging—Aligning mission, vision, values and culture
• Listening and feedback from stakeholders
• Budgeting
• Metrics and ongoing assessment
• Mistakes to avoid
• Dealing with a crisis.

Building a Strategic Plan for Your Communications Program—
Multiemployer Plans
This session will help you hone in on the key elements of building your own comprehensive and effective strategic plan, including:
• Strategic planning process and components
• Your value proposition
• Branding and messaging—Aligning mission, vision, values and culture
• Listening and feedback from stakeholders
• Budgeting
• Metrics and ongoing assessment
• Mistakes to avoid
• Dealing with a crisis.
MONDAY, JULY 23, 2018 (Continued)

11:00 a.m.-12:15 p.m.
Listening to Stakeholders

In the benefits communication world, plan participants are key among the stakeholders. This session will address the best ways to listen to what your stakeholders are saying, including:

• Gathering information (big data)
• Tools—Surveys, focus groups, jobsite visits, social media
• Feedback
• Key indicators and what to look for
• Questions you should be asking
• Two-way communication.

12:15-1:45 p.m.
Luncheon

1:45-3:00 p.m.
Concurrent Sessions

Communications and Fiduciary Responsibility in the U.S.
The robust legal, legislative and regulatory environment surrounding benefits in recent years creates communication challenges for plan sponsors. This session will address:

• Updates on the legal and regulatory activity that impacts your communication program
• Pension and health checklist of compliance requirements
• HIPAA
• EEOC rules and harassment
• Dealing with missing participants
• Fiduciary rule and investment advice
• Meeting your obligation without sacrificing your brand.

Playing Nicely in the Communications Sandbox—
The Canadian Legal Landscape

Pension and health benefit providers face a constantly developing regulatory world that challenges traditional approaches. Join this fast-moving session to learn practical tips about a variety of legal and regulatory issues you need to know about when communicating with your plan members, including:

• Using social media
• Protecting your online reputation
• Getting effective online consent
• Canada’s Anti-Spam Legislation (CASL)
• Contests and promotions
• Tracking website user activity
• Mobile communications
• Human rights dos and don’ts
• Background checks
• Why EU privacy laws matter.

This conference gave me some great ideas and direction to start addressing my communication needs.

Joshua Hertzberg
Office Manager
International Longshoremen’s Association—Local 1804-1
North Bergen, New Jersey
Data Analytics

We are in a world that gathers data on everything we do. This session will explore how big data and data analytics can be harnessed in support of your benefits communication program. Topics include:

- Tools and techniques for analyzing data
- Communications data and what to do with it
- Examples and case studies
- Frequency
- Challenges and opportunities.

Moving the Goalposts—A Case Study About Improving the Participant Experience

As benefits professionals, we all face similar challenges in finding creative solutions to engage and communicate benefits with an ever-changing work force that is heavily reliant on quick and easy access to information. This session will present a case study review of how the NFL Players Association has approached outreach, engagement and improving their participant experiences, including:

- Challenges
- Solutions and innovations
- Failures and key learnings
- Creating a culture of constant improvement.

Harnessing the Power of Social Media and Apps

The explosion of social media and apps has given plan sponsors a multitude of tools to engage plan participants. This session will feature a discussion on:

- Platforms
- Engagement and creating communities
- Texting, apps and gamification
- Risks and policies
- Analytics
- Best practices.

Communicating Health and Financial Wellness

- Best use of technology
- Leveraging data
- Compliance
- Examples and best practices
Benefit Communication and Technology Institute

TUESDAY, JULY 24, 2018 (Continued)

9:30-10:45 a.m. Concurrent Sessions
Maximizing the Potential of Your Website
Your website is an ecosystem of communications with the potential to inform, engage and interact with your plan participants and other constituents. This session will explore best practices including:

- Policies
- Navigation and self-service
- Participant tools and user experience
- Branding and writing for the web
- E-remittance and online statements
- ADA and AODA.

Guided Open Forum
A panel of experts will address your questions and challenges relating to benefits communication and technology. This is also a great opportunity to share innovative ideas or discuss programs you are working on.

11:00 a.m.-12:15 p.m.
Data Privacy and Security—Be Prepared
With so much attention on data breaches in the media, many fear the whole issue of privacy and security. This session will look at the scope of the problem and focus on:

- Identifying your risks
- Internal controls and policies
- Cyberinsurance
- Data retention
- Identity theft and how to educate participants
- What do you do when you have a breach?

12:15-1:45 p.m.
Luncheon

1:45-3:00 p.m.
Benefits Issues and Trends
There are many hot topics in the industry that have implications for those who work with communicating benefits. This session will feature a discussion on these issues and best approaches from a communications perspective to deal with:

- MPRA cuts
- PBGC funding
- Marijuana and drug testing
- Mental health, substance abuse and the opioid crisis.

3:15-4:30 p.m.
What’s Next?—Turning Your Conference Experience Into Action
Building on the key takeaways from each conference session, this finale will summarize the key issues and offer strategies to consider with your stakeholders following your experience in Portland.

- What should you be doing next?
- Ideas and opportunities
- Best practices
- Key messages and strategies
The Benson, a Coast Hotel
Portland, Oregon

Explore all Portland has to offer from one of the city’s most treasured historic landmarks. Founded in 1913, The Benson features elegant European design with a host of modern amenities. See why U.S. presidents and CEOs have made The Benson their home away from home for a hundred years. While retaining their luxurious continental feel, all rooms were refreshed in 2017 to capture the perfect blend of aesthetics and comfort. Superb location puts you within walking distance to all of the shopping, dining and entertainment of the Pearl District, Pioneer Square and downtown. Famous boutiques, bookstores, breweries and performing arts are just steps away.

Room Rate: $244 single/double
Reservation deadline: June 22, 2018

Benefits Communication for Plan Sponsors Web Page

www.ifebp.org/benefitcommunication

No doubt about it: Benefits communication is challenging. In a recent survey, 80% of plan sponsors said their employees are not reading communications materials. This online tool provides:

- Survey results
- Sample employee communication materials
- Recorded webcasts
- Short videos from experts
- Books
- Blog articles
- And more!

CONNECT WITH US

#IFBenCom
New Sponsorship Opportunity in 2018!

Service providers can gain valuable exposure for their organizations when they sponsor the Benefit Communication and Technology Institute. You’ll network with 100+ U.S. and Canadian attendees seeking resources on the latest requirements, current trends and best practices for communicating benefit plans to their members.

Three sponsorship levels are available, each with its own bonus rewards that include, but are not limited to, those listed below.

**Gold Sponsorship | Attendee Lunch**
- Company name and logo on conference signage and table tent cards at attendee luncheon
- Complimentary, six-month enhanced listing on the Service Provider Directory
- Logo, contact information and company description in the on-site Sponsor Directory
- One complimentary and one discounted conference registration

**Silver Sponsorship | Continental Breakfast**
- Company name and logo on conference signage and table tent cards at continental breakfast
- Logo, contact information and company description in the on-site Sponsor Directory
- One complimentary conference registration

**Bronze Sponsorship | Refreshment Break**
- Company name on conference signage and table tent cards at refreshment break
- Company name and contact information included in the on-site Sponsor Directory
- One conference registration at 50% discount

This event only takes place every other year, so now is the time to act!
Interested in learning more? Contact Diane Mahler today!
Diane Mahler | dianem@ifebp.org | (262) 373-7656
PASSPORT NEEDED
Canadian attendees will need a passport to gain entrance into the United States.

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 45 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.

REGISTRATION POLICIES
- See our policies regarding registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.
- Cancellation/transfer requests must be in writing and are subject to a fee of US$50 per meeting day for cancellations and US$50 for transfers.
- Cancellation fee is 50% of registration fee for registrations canceled within 30 days of meeting.
- Cancellations received on or after the opening day of a program are subject to forfeiture of all registration fees.
- For more information regarding administrative policies, please contact Registrations at (262) 786-6710, option 2, or edreg@ifebp.org.

EDUCATIONAL RESOURCES
- Employee Benefits Glossary 13th Edition
  This practical, comprehensive glossary has been substantially expanded to include over 4,000 terms commonly used by employee benefits trustees and professionals. More than 700 terms are new, and many others have been updated to reflect changing government policies and evolving interests. Inside this 13th edition, you’ll find user-friendly explanations, examples drawn from real-world situations and extensive cross-referencing that covers a broad range of topics, including:
  - Compensation
  - Financial planning
  - Human resources
  - Employee benefits design, funding and administration
  - Government regulations and legislation
  - Investments
  - Health care and cost-containment strategies
  - Labor relations.

There is also a list of more than 1,000 acronyms and abbreviations covering a wide range of benefits-related topics. (International Foundation)

272 pages. 2016. Item #7570.
US$75 (Members: US$49). Price includes shipping and handling.
To order, visit www.ifebp.org/glossary.

PASSPORT NEEDED
Canadian attendees will need a passport to gain entrance into the United States.
## Registration/2018

### Benefit Communication and Technology Institute (17-1817)

#### Customer Information (Please print clearly)

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<thead>
<tr>
<th>Individual ID# or CEBS® ID#</th>
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<td>Full first name</td>
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Last 4/3 digits of SSN/SIN Date of birth (mm/dd/yyyy)  

- [ ] Yes, send me promotional/informational e-mail communications from the International Foundation.  
- [ ] No, do not send me promotional/informational e-mail communications from the International Foundation.  

I have authority to provide consent/no consent for those included in this registration.  

- [ ] Yes  
- [ ] No  

- [ ] Form completed by Phone  

See policies regarding registration/cancellation/refund/record retention/photo release and privacy at [www.ifebp.org/policies](http://www.ifebp.org/policies).

### Registration Information

- Organization representing  
- Organization #  
- Badge name  
- Badge title  

### Benefit Communication and Technology Institute

#### July 23-24, 2018 | Portland, Oregon  

**Member fee** | US$1,225  
**Nonmember fee** | US$1,445  

**CANCEL POLICY:** Early cancel fee is US$50/meeting day. Within 30 days of meeting, cancel fee is 50% of registration fee.

#### Hotel

- Reservation deadline: June 22, 2018  
- Include US$350 deposit  
- The Benson, a Coast Hotel (US$244 single/double)  
- Arrival date  
- Departure date  
- # of Adults  
- # of Children  
- [ ] King bed  
- [ ] Two beds

### Continuing Education Credit

- US$25 continuing education service charge due at time of registration (if applicable).  
- The International Foundation will apply for CE credit based on requests indicated below.  

- [ ] Actuary  
- [ ] Attorney  
- [ ] CFP  
- [ ] CIMA  
- [ ] CPA  
- [ ] Insurance Producer*  
- [ ] PHR/SPHR/GPHR  
- [ ] SHRM-CP/SHRM-SCP  
- 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 credit.

### Payment Must Accompany Order

- Make check payable to International Foundation.  

- [ ] Check # US$  

- [ ] Credit card #  

- Exp. date  

- Cardholder’s name (print)  

### Registration/Order Summary

- Conference fee US$  
- Hotel deposit (US$350) US$  
- Continuing education fee (US$25) US$  

**Total (U.S. funds)** US$
Register by June 11 to save $300 with the early registration discount!

Visit www.ifebp.org/benefitcomm to register, or call (888) 334-3327, option 2, for more information.

Priority Code: 1817  W

Session Topics Include:

- Evolution of Communication
- Building a Strategic Plan for Your Communications Program
- Listening to Stakeholders
- Data Analytics
- Harnessing the Power of Social Media and Apps
- Maximizing the Potential of Your Website
- Data Privacy and Security

Benefit Communication and Technology Institute
July 23-24, 2018 | Portland, Oregon