



THRAC 2018

November 8, 2018
Hilton Garden Inn at Levis Commons
Perrysburg, Ohio

* Sessions for which HRCI Business credit has been approved are marked with a red asterisk.



Pre-Conference Workshop *

Wednesday, Nov 7, BGSU at Levis Commons (1:00 pm—4:00 pm)

Workplace Tragedy: How to Be Your Best When the Worst Happens

John Patrick and Mark Putnam, Corporate Intelligence Consultants; Katie Collins and Linda Lindsey, Harbor; Tonya Rider, Bowling Green State University; Andy Birr and Teresa Scott, The Andersons; Amanda Geletka, USI

Topic Summary: Our society is witnessing an alarming increase in workplace tragedies. We may experience workplace tragedy as an accidental death, an active shooter, a drug overdose, or one of many other similar incidents. We all hope never to experience such tragedy, but as Human Resource professionals, it is imperative that we proactively prepare in case it does happen. In this three-hour workshop you will learn from the real life experiences of those who have experienced a work-related death, from experts in how to respond to workplace violence, and from an Employee Assistance Counselor about how to respond when tragedy strikes.

Presenter Bios: **John Patrick** has over 35 years of law enforcement and private security experience, and formerly held management positions in plant and corporate security. Throughout his career, John has acted as a consultant for large businesses and Fortune 500 companies. He has had responsibility for developing and managing domestic and international proactive and reactive security programs involving security best practices, crisis management, incident response, executive protection and workplace violence policies and training for long term healthcare facilities, hospitals and clinics in addition to private, non-healthcare related businesses.

Mark Putnam retired from the Perrysburg Township Police Department in 2003 after being injured in the line of duty. He has 20 years of law enforcement experience, and is a former Chief Deputy of Operations for the Ottawa County Sheriff's Office. Mark has had extensive training and has a wide range of skills in the areas of investigative analysis of violent crimes, informant development in the terrorism field, surveillance, undercover investigative techniques, state and local anti-terrorism training, and undercover narcotics training. His is a former police academy instructor and a police administrative specialist and consultant.

Katie Collins is the coordinator of Harbor's EAP, a program that provides behavioral health expertise and support to organizations and employees throughout the United States and Canada. Katie is a Licensed Professional Clinical Counselor and a Certified Employee Assistance Professional. Katie has experience serving organizations in an array of roles, including counseling and coaching, consultation, organizational compliance and developmental training, and crisis intervention. She also has expertise in the field of substance abuse and addiction, and is working to earn her license as an Independent Chemical Dependency Counselor and her DOT Substance Abuse Professional (SAP) qualification. In addition to her role at Harbor, Katie serves as the president of the Greater Toledo Chapter of the Employee Assistance Program Association.

Linda Lindsey holds a bachelor's degree in psychology and a master's degree in agency counseling from the University of Toledo. She is licensed in Ohio as a Licensed Independent Clinical Counselor and Chemical Dependency Counselor, and is a Certified Employee Assistance Professional. Linda has over 25 years of experience working with individuals, couples, and families, with 17 years as an internal healthcare EAP consultant. She has experience providing human resource training and consultation in corporate, industrial, and healthcare settings regarding drug and alcohol policy, family issues, supervisory skills, stress management, sexual harassment, diversity, workplace violence prevention, and other topics of interest to employers and their employees.

Detective Tonya Rider worked for the Toledo Police Department for more than 26 years, retiring in 2016. During her career she investigated a variety of offenses, most notably hundreds of sexual assault offenses while assigned to the Special Victims Unit and numerous homicides and felonious assault offenses while being assigned to the Crimes Against Persons Unit. For the past ten years she has facilitated training on behalf of the Ohio Attorney General's Office on Identifying Sex Offenders, Non Stranger Sexual Assault, and Campus Response to Sexual Assault. Tonya earned her master's degree in organizational leadership from Lourdes University in 2011. Currently she teaches Forensics Investigations courses at Bowling Green State University.



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Pre-Conference Workshop (continued) *

Andy Birr is a lifelong Toledo resident. He attended the University of Findlay where he received a degree in environmental science and hazardous materials management while minoring in public policy. Andy has over 17 years of experience leading safety and health efforts in industries such as steel recycling, food and grain, government, and public service. Andy is a Board-Certified Safety Professional (CSP) and a Certified Health Care Safety Professional (CHSP). Andy resides in Toledo with his bride of 15 years and their two children.

Teresa Scott has spent the majority of her career at The Andersons, beginning as a compensation and benefits analyst. As Director, Human Resources, Rail and Corporate Finance, Teresa has responsibility for strategic business and human capital planning, employee relations, safety oversight, talent management, leadership development, succession planning, merger and acquisition leadership, and multi-state location oversight and legal compliance. She earned her BBA and MBA in human resource management from the University of Toledo.

Amanda Geletka joined the USI Insurance Services Toledo office in 2004. She has over 14 years of commercial property and casualty insurance experience and has earned designations as a Certified Insurance Service Representative (CISR), Certified Insurance Counselor (CIC), Cyber Risk Manager (CyRM), and Certified Risk Manager (CRM). Amanda is a proud graduate of the University of Toledo College of Business with a bachelor's degree in business administration and a minor in business law. Amanda spends a tremendous amount of time and energy giving back to her community. Her volunteer experience and understanding of the challenges non-profits face has set her apart in her industry. As a result, she leads USI's office in the non-profit, social service and healthcare sectors. Amanda is a wife and mother of three vibrant kiddos.

Early Bird Sessions

Thursday, Nov 8, Hilton Garden Inn (7:30 am—8:30 am)

Reshaping the Organization's Future Through Collaboration and Engagement * (*Steve Cady*)

Topic Summary: At the edge of collaboration is a renewed understanding that the only way to truly foster meaningful change is to have meaningful conversations, resulting in that which is better than any one person can create alone. At the heart of this notion is the fundamental belief that people are wise and when engaged effectively, the solutions are more innovative, energizing, long-term, and motivating. An important byproduct of such collaboration is the replacement of resistance to change with a commitment to action where people support and defend that which they helped to create. We will use the change formula as a guide for creating conditions that transform people and organizations in an accelerated fashion.

Presenter Bio: **Dr. Steven H. Cady** is a professor, author, speaker, and consultant. He serves on the graduate faculty at Bowling Green State University where he has published more than thirty articles on collaborative change and organizational development. His work has taken him around the world with ConAgra, Alcoa, Marathon Petroleum Corporation, Japan's Fukushima disaster, The Tavistock Group, Department of Developmental Disability, Social Change in Amsterdam, Change Management in South Africa, Cooperative Extension, Central Florida's Medical City, Dana Corporation, and Chrysler. Dr. Cady is the co-author of *The Change Handbook*, the leading resource on today's best methods for engaging large organizations and communities in complex change. In 2007, he founded an organization that became known as NEXUS4change, a global community of more than 8,000 professionals working together to advance collaborative change as a way to deal our world's most intractable challenges. His recent work focuses on passion for work and life with his book *Stepping Stones to Success* and PBS program and DVD entitled "Life Inspired."



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Early Bird Sessions (continued)

Thursday, Nov 8, Hilton Garden Inn (7:30 am—8:30 am)

Veteran-Friendly Workplaces (*Meghan Michael*)

Topic Summary: In this session, Meghan will briefly discuss military culture and describe the types of skills veterans bring to the workplace and the types of company cultures veterans desire in a workplace. She will also briefly discuss Ohio-specific veteran data and describe how to become designated as a veteran-friendly workplace in the state of Ohio.

Presenter Bio: **Meghan Michael**, PHR, SHRM-CP, is a retired Navy veteran who served over twenty years on active and reserve duty. She is a graduate of the United States Naval Academy and the University of San Diego. During her time on active duty, she served as Mission Commander and Tactical Coordinator in the P-3C Orion, deploying to areas around the world such as Japan, South Korea, Thailand, Australia, Diego Garcia, Bahrain, and Oman. The pinnacle of her flying career was flying missions in support of American and allied ground troops in Afghanistan shortly after 9/11. Meghan also served as Director of Personnel, Operations and Training in Everett, WA, Executive Officer of Navy Operational Support Center in San Jose, CA, and Commanding Officer of the Navy Operational Support Center in Toledo, OH. Since retiring, Meghan has dedicated her time to veteran issues, and serves as the Co-Chair of the Northwest Ohio Military Affairs Committee. She has started her own business, HR Navigator, whose primary mission is educating small businesses on the benefits of hiring veterans and the mechanisms for creating workplaces that attract and retain the best veteran employees.

Keynote Sessions

Opening Keynote Session (9:00 am—10:00 am)

On The Ledge (*Barb Roose*)

Topic Summary: Playing it safe is boring! But risking it all is scary. How can you challenge yourself to move to the next level in your personal life or career? Using her skydiving experience and personal journey, Barb shares three powerful insights that will challenge, motivate, and equip you to leave your comfort zone and leap into the adventure of life.

Presenter Bio: **Barb Roose** is a speaker, author, and life coach from the Toledo area. As a speaker and leadership development coach, she motivates and equips audiences to elevate their personal leadership abilities. Barb's dream is for you to believe that you can win at life, and her goal is to help you discover how to do it. After graduating from Bowling Green State University as a young wife and mother, Barb carved out a career as an award-winning pharmaceutical sales representative and non-profit executive director. Prior to becoming a speaker and author, Barb served for 14 years on the staff at Cedar Creek Church in Perrysburg, Ohio, most recently as the Executive Director of Ministry. As a community volunteer, Barb has served on more than ten overseas mission trips, and as a board volunteer, mentor, and in other community volunteer roles. She was inducted into the Medina City Schools Hall of Fame in April 2016.



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Keynote Sessions (continued)

Lunch Keynote Session (12:30 pm—1:30 pm)

The Purpose Revolution: Winning and Engaging Talent In An Age of Social Good
(Dr. John Izzo)

Topic Summary: This session will help Human Resource professionals understand emerging trends in the workforce that lead to higher retention, higher engagement, and increased on-the-job performance. Attendees will learn practical tools to make changes in recruiting, hiring, and managing employees to increase sense of purpose and thereby impact the outcomes above.

Presenter Bio: Dr. John Izzo is a bestselling author, community leader, and one of North America's most sought-after voices on leadership. Dr. Izzo holds two master's degrees in theology and psychology, as well as a Ph.D. in communication, and is the author of seven books. His most recent book, *The Purpose Revolution*, shares how leaders can create engagement and competitive advantage in an age of social good. Dr. Izzo has advised over 500 organizations and produced a five-hour television series for the Biography Channel and PBS. His work has been featured by the likes of Fast Company, the Wall Street Journal, CNN, and Inc. Magazine. He has advised some of the best companies in the world including DuPont, Tim Horton's, IBM, McDonald's, RBC, Lockheed Martin, Qantas Airlines, and the Mayo Clinic. Beyond his work as a corporate advisor, he has been involved extensively in issues of conservation, poverty, and international stability, and is a Distinguished Fellow at the East-West Institute, a New York-based think tank.

Closing Keynote Session (3:15 pm—4:15 pm)

Whitewater Leadership: Navigating Workplace Rapids (Greg Hawks) *

Topic Summary: Organizations today face a dizzying array of challenging legal requirements, jolting people issues, and unexpected twists and turns that can feel a lot like navigating white water rapids. Fortunately, the HR leader is uniquely positioned to provide significant guidance and counsel that can ensure the success of not only the employees, but the organization as a whole.

In today's work environment, there are three main causes of the workplace rapids that keep HR professionals constantly maneuvering: *pressure*, *terrain changes*, and *obstacles*. Of those three elements, obstacles are particularly onerous, and although most employees and leaders view them negatively, the HR leader as a true Business Partner sees obstacles as an advantage and meets them head-on with well-crafted strategies and a laser focus on business results.

In this adrenaline-inducing seminar, you will leave *loving obstacles* as we explore the advantages they provide you as a business professional.

Presenter Bio: Greg Hawks has spent his life investing in people. As an entrepreneur and business owner, he understands that the more ownership people take, the more they will be fulfilled and productive. Passionate about leaders, teams and organizations reaching for greatness, Greg instigates and empowers through innovative ideas. For over 20 years, through not-for-profit and for-profit organizations, he has built teams, mentored leaders, crafted culture, and had a lot of fun. With a vast leadership portfolio, he brings a varied and healthy perspective to people development. Greg has an amazing wife who surprisingly has been married to him for over 22 years. They have two unique kids who are delightful, most of the time.



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Concurrent Sessions

Session 1 (10:30 am—11:30 am)

Become a Better Leader! *(Mike McCartney)*

Topic Summary: Do you want to become a better leader? Do you know how? Successful people always want to improve, no matter how good they are. But they don't always know how. In this fun, fast-paced and interactive session, you'll learn how to become an even better leader based on a few simple steps from the work of Marshall Goldsmith, recognized as the number one leadership coach in the world.

Presenter Bio: Mike McCartney of McCartney Coaching, Ltd. partners with senior leaders and high achievers for next-level leadership. Mike is a Master Coach, Stakeholder-Centered Coaching, by Marshall Goldsmith—one of a select few of 2,500 certified coaches. He is also a coach with the University of Michigan's Ross School of Business, a visiting lecturer with the University of Toledo's College of Business and Innovation, and a graduate of The Ohio State University.

Delivering Value Through Effective Wellbeing Strategy - No Budget Necessary! * *(Susan Bailey)*

Topic Summary: What happens if we invest in caring for our employees and they leave? What happens if you don't invest and they stay? Attracting and retaining talent is a challenge we are facing like never before, and the unemployment rate is expected to continue to drop through 2018. Checking the box on health and wellbeing strategy with simple tactics is no longer an effective strategy. The workforce of tomorrow is willing to work hard for organizations that care about their wellbeing and the health of the communities and environments they live and work in. Attendees in this engaging session will walk away with a game plan for gaining leader buy-in for a wellbeing strategy that meets employees' needs and delivers triple bottom line – people, planet and profit – impact.

Presenter Bio: Susan Bailey is a high-energy leader with more than twenty years of diversified experience in health, benefits and education settings. In her role as Director of Total Health & Wellbeing at MMA-Michigan, she calls upon a wealth of knowledge of the employee, employer and vendor sides of population health to provide strategic consultation to help organizations build supportive cultures that empower individuals to live healthy, engaged lives.

Susan was instrumental in the success of a number of best-in-class health and wellness strategies including initiatives at DTE Energy, Beaumont Health System, and Chrysler. Prior to joining MMA in 2016, Susan led the Health and Wellbeing Strategy Consulting team at RedBrick Health where she provided strategic support and guidance to the account teams and clients. Susan also worked in the public health sector as a Health Promotion Coordinator for the Gaston County Health Department in North Carolina where she developed a county-wide fitness and nutrition program for residents. She remains committed to community health improvement through active involvement in the Michigan Wellness Council.

Susan is dedicated to sharing best practices and learning in the field of health and wellbeing. Speaking engagements include presentations at various human resource events, HERO, National Business Group on Health, and Truven Health Analytics conferences. Susan also serves on the faculty of the National Wellness Institute as a trainer for the Certified Worksite Wellness Program Manager certificate.

Susan is a Certified Intrinsic Coach® and is SHRM-SCP and SPHR certified, with a Bachelor's of Science degree in education from Central Michigan University. Susan also holds a Master of Science degree in health promotion from the University of North Carolina at Charlotte. Susan is a graduate of Leadership Oakland class XIX, and remains involved with the organization to this day as a board member and retreat facilitator.

Recognized for her passion and enthusiasm, Susan is on a mission to help others find their own high energy, good health, and passion for life. Susan integrates her passion for wellbeing into her own life through time spent with her husband and two boys at her cottage in northern Michigan and conquering various outdoor pursuits like paddle boarding, hiking, swimming, playing soccer, an occasional sprint triathlon, and traveling to warm, sunny places.



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Concurrent Sessions (continued)

Session 1 (10:30 am—11:30 am)

Six Questions to Ask to Get the People Performance You Need (*Lisa Toenniges*)

Topic Summary: Ensuring that employees perform to company expectations is core to an organization's success. Knowing the most effective way to get the people performance needed, as well as how to effectively solve performance issues, is critical to the business of human resources. During this session, Lisa will explain the factors that influence employee performance. She will also help you to know the appropriate questions to ask to determine the root causes of performance issues and ways to identify possible solutions to address them.

Presenter Bio: **Lisa Toenniges** is the CEO and owner of Innovative Learning Group (ILG). A dynamic and respected leader, Lisa has nearly thirty years of experience in the performance improvement industry, and has consulted with many Fortune 1000 companies about their learning strategies and solutions. ILG was born out of Lisa's passion for building a business, providing for her employees, and doing what is right for clients. Her dedication has earned ILG many awards, including being named to the Inc. 5000 List of America's Fastest-Growing Private Companies and being designated one of Michigan's 50 Companies to Watch. Lisa has devoted three decades to the International Society for Performance Improvement, and last served on its board of directors as past president. She also is a Certified Performance Technologist. Lisa has a master's degree in instructional technology from Wayne State University and a bachelor's degree in music education from Michigan State University.

Legal Issues Facing HR Professionals (*Tony Fiori*)

Topic Summary: This session will provide an update on a variety of employment law topics pertinent to HR professionals including the effect of the Tax Cuts and Jobs Act of 2017 on business, what law changes have been or will be enacted to deal with sexual harassment in the workplace, an update on the status of the white collar exemption, what's happening with healthcare reform, what is now considered joint employment, and other issues including the opioid crisis, medical marijuana, and succession planning.

Presenter Bio: A recognized authority on health plan regulatory and financial issues, **Anthony Fiori** advises healthcare industry clients on regulations and strategy, analyzes policies, and manages projects. Tony works with managed care organizations, hospitals, long-term care organizations, state Medicaid agencies, pharmaceutical manufacturers, and trade associations, bringing depth and perspective to public health insurance programs.

Currently, Tony leads a coalition of non-profit Medicaid managed care plans in New York, and represents these plans before the New York State Department of Health and other regulatory and legislative bodies on rate development, payment and delivery system reform, managed care expansion, health homes, and quality measurement. He also advises state hospitals and plans implementing the ACA and Medicaid redesign—including the expansion of Medicaid managed care—in New York, Alabama, Oregon, North Carolina, and other states.

In addition, Tony counsels key healthcare stakeholders on the implications of the ACA and other payment reform initiatives such as the Centers for Medicare & Medicaid Services' Shared Savings Program. Tony helps clients navigate these complex initiatives and advises them on the potential opportunities these programs bring to the healthcare marketplace. He is a recognized consultant on federal Medicaid pharmaceutical policy, advising clients on the implications of those policies with regard to their business.

Before joining Manatt, Tony worked for the New York City Economic Development Corp. where he structured debt for non-profits including a number of healthcare-related organizations. He was also a consultant to the Henry J. Kaiser Family Foundation where he co-authored a report on the health insurance market and its impact on employer coverage. As a policy advisor for the San Diego Regional Chamber of Commerce, Tony led a campaign to educate community and business leaders on the importance of a comprehensive and affordable healthcare network.

Tony earned a BA from the University of California, San Diego and an MPA from Princeton University's Woodrow Wilson School of Public and International Affairs.



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Concurrent Sessions (continued)

Session 2 (2:00 pm—3:00 pm)

Recognizing The Needs of Employees With Substance Abuse Issues (Matt Bell)

Topic Summary: Matt will share a personal story of his struggle with addiction: how he never thought drugs would be a part of his life, and how the worst drug eventually was his life. He will share his journey through addiction, what he learned, and what he's doing today because of it.

Presenter Bio: **Matt Bell**, 31, is the president and co-founder of Team Recovery and the Chief Operations Officer of Midwest Recovery Center & Midwest Detox Center. Born and raised in Toledo, he graduated from St. Francis de Sales in 2005, and earned an academic/athletic scholarship to the University of Toledo where he played baseball. After an injury, he became addicted to the pain killers that were prescribed to him. One thing led to another, and as we see so often today, Matt's situation turned into a nine-year battle with heroin. Jail time, arrests, and overdoses became his reality, although they were never anything he foresaw or dreamed of doing. Today, in Team Recovery and Midwest Recovery Center, he uses his past and his biggest liabilities as assets to help individuals and families who are still suffering from the disease of addiction, and to carry an important message to our youth.

Using Compensation Management as a Tool to Recruit and Retain Top Talent (Jen Givens and Brad Smith)

Topic Summary: A strong job market is great news for employees and job seekers, but it can be a formidable challenge for employers that must compete for new talent as they struggle to retain top performers. In today's economy, employers that fail to attract and retain talent will ultimately lose, and employers with poor retention rates will find themselves spending more time and money recruiting and training new employees than focusing on growing their business. Finding a solution (or solutions) is critical to long-term success. Successful companies know that one way to compete for talent is to become a preferred employer. An essential element in achieving preferred employer status is a well-thought out compensation strategy. This is crucial, as compensation is one of the top three drivers of attrition. During this session, the presenters will discuss best practices in compensation strategy and design, and provide useful examples that will assist in enhancing your company's compensation philosophy.

Presenter Bios: **Jen Givens** is a consultant with Findley. Prior to joining the firm in 2016, Jen worked in corporate compensation within the banking and utility industries. She consulted with clients throughout the organization on their compensation, benefits, time-off policies, and other various HR programs, providing a consultative approach focusing on improvement initiatives. With over nine years of experience, Jen works to assist clients in enhancing financial performance and/or attracting and retaining human capital. Her work includes researching and analyzing compensation data, conducting competitive market analyses, and creating total compensation reports. Jen received her MBA from Cleveland State University and her BBA from Ohio University.

Brad Smith is a consultant with Findley. Prior to joining the firm in 2014, Brad worked with several CPA firms performing audits in a variety of industries, and served as Controller/Chief Operating Officer of a privately-held business. He works to assist clients in enhancing performance through financially responsible planning. Brad's work includes helping clients define their desired outcomes, develop strategy to best enable them to meet those outcomes, and design systems to execute on the strategies. Brad also provides benchmarking data to clients so they can make informed decisions regarding pay. Brad is a licensed Certified Public Accountant (CPA), and is a member of the American Institute of Certified Public Accountants (AICPA). He received his BAS from Capital University.



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Concurrent Sessions (continued)

Session 2 (2:00 pm—3:00 pm)

Mock Trial: Sexual Harassment is No Courtroom Adventure (*Bill Beach*)

Topic Summary: Employers, leaders, and HR professionals must take complaints of sexual harassment in their organizations very seriously and respond to those complaints promptly, thoroughly, and effectively. This session will present a mock trial of a sexual harassment case and provide attendees with tools to help them address the critical issue of sexual harassment from identification of an issue through investigation, documentation, and resolution.

Presenter Bio: **Bill Beach** is a partner with Robison, Curphey & O'Connell. He practices in the areas of employment law, business law, and related litigation, and advises and represents public and private employers on the many issues affecting the employer-employee relationship. Bill offers management advice addressing matters from practical day-to-day inquiries to proactive planning and tactics including resolving employer compliance issues regarding judicial, legislative and administrative enactments found in common law, the Ohio Revised Code, the Ohio Administrative Code, as well as the ADA, ADEA, COBRA, MLA, NLRA, SERB, Title 7, and the WARN Act. Bill provides proactive planning advice on matters such as hiring practices, employee handbooks, discharge documentation and management training regarding sexual harassment, discrimination and investigative techniques. Bill earned his Juris Doctorate from the University of Toledo College of Law and his undergraduate degree from the University of Pittsburgh.

