



INTEGRATED
BENEFITS
INSTITUTE

28TH ANNUAL

HEALTH AND PRODUCTIVITY FORUM

Unlock the Full Value of Your Workforce

AUSTIN, TX | SEPTEMBER 30 - OCTOBER 2, 2026

FORUM AGENDA

www.ibiweb.org



Wednesday, September 30th

PRE-CONFERENCE WORKSHOP

Wednesday, September 30th

2:00-4:00 p.m. CT

What Do Employers Need and Want to Know? Rethinking Health Economics and Evidence Generation

What data do employers need to best inform benefit strategies? What evidence will provide the edge to support a high-performing workforce? This session will explore evidence generation through presentation and discussion with the audience around new considerations for an expanded view of health economics tied to research. This expanded view aims to integrate traditional cost metrics into the full range of outcomes relevant to patients, families, caregivers, as well as payers, clinicians, and purchasers. Facilitated by PCORI, this workshop will provide participants with an opportunity to inform guidance to the research field on those outcomes that matter most to employers.

Greg Martin, Chief Officer Engagement, **PCORI**

Casey Quinn, Senior Advisor, PCBEOs, **PCORI**

Karen van Caulil, President and CEO, **Florida Alliance for Healthcare Value**



Early Registration & Welcome Reception

Wednesday, September 30th

4:00-5:30 p.m. CT

Zanzibar, Rooftop Deck

Join us for an evening of cocktails and hors d'oeuvres! Arrive early to collect your conference materials and take the opportunity to network with fellow attendees and vendors.



Conference Events

Thursday, October 1st



Fun Run around
Lady Bird

6:30 - 7:30 a.m. CT



Networking
Breakfast

7:00 - 8:30 a.m. CT



Conference
Registration

7:30 - 5:00 p.m. CT



Offsite reception
at Bangers

6:00 - 9:00 p.m. CT



Welcome

8:30 AM – 8:40 AM CT

Welcome to IBI's 28th Annual Health & Productivity Forum

Jim Huffman, CEO, **Integrated Benefits Institute**

How Leading Employers Are Modernizing Benefits with Data and AI

8:40 AM – 9:30 AM CT

Reactive sick care is no longer the only option. As AI, digital health, and consumer expectations reshape healthcare, leading employers are innovating benefits to empower employees to take a more data-driven approach to their health. Join Total Rewards leaders from Q2 and Invited to discuss how they're evaluating next-generation health benefits and adapting to changing workforce expectations. Learn why emerging insights—like signs of metabolic dysfunction in 65%+ of members and elevated cardiovascular risk in 54%—are changing how innovative employers think about prevention, engagement, and benefits strategy.

Ashley McGimsey, SVP, Total Rewards and HRIS, **Invited Clubs**

Michael Quincey, VP, Total Rewards, HR Technology & People Analytics, **Q2**

Brock Anderson, Head of Population Health Strategy, **Function Health**



The Precision of Proactive Intervention: Targeted Health Strategies for MGM Resorts

9:35 AM – 10:25 AM CT

Even the smartest strategic plans fail if they don't change human behavior. In this session, discover how MGM Resorts partnered with Well's AI-native engine to transform workforce health from a cost center into a value driver by bridging the gap between data insights and member action. By shifting from reactive advocacy to proactive, individualized guidance, MGM Resorts ensures benefits design drives real employee action—stabilizing population health and controlling the total cost of care.

Renya Spak, Chief Growth Officer, **Well**

Heather Hatchett, Senior Manager, Well-being Benefits, **MGM Resorts International**



Refreshment Break 10:25 - 10:45 AM CT

The Case for a Preventive Health System

10:45 AM – 11:35 AM CT

Prevention has a time problem, which is driving our well-documented engagement problem — leaving companies and health plans in a virtually impossible situation to impact prevention in any meaningful way. This session will discuss the need for a 'preventive health system' and review strategic research identifying the key reasons for the lack of participation and engagement. Additionally, in the session, we will help define a strategy to overcome these challenges.

Carl Noble – CEO, **PathFinder Health**

Jennifer Spence, SVP – National Director, **Alliant**

Sera-Leigh Ghouralal, PhD – Director of Research, **Integrated Benefits Institute**



Thursday, October 1

IBI Lifetime Achievement Award

11:40 AM – 12:00 PM CT

One of the highlights of this year's Forum will be the presentation of the IBI Lifetime Achievement Award, honoring Mary Tavarozzi for her outstanding contributions to workforce health, well-being, and productivity. Join us as we recognize a remarkable career and celebrate the lasting impact of her leadership on our industry.

Jim Huffman, CEO, **Integrated Benefits Institute**

Mary Tavarozzi, Principal, **MLT Advisors LLC**



IBI Annual Forum Luncheon 12:00 PM - 1:15 PM CT

Concurrent Sessions 1A, 1B, 1C

Making Effective Workforce Decisions with Comprehensive Integrated Data

1:30 PM – 2:10 PM CT

Employers are increasingly overwhelmed by point solution vendors promising measurable ROI, yet few have the tools or methodology to independently validate those claims. This session presents a real-world case study demonstrating how one employer leveraged a fully integrated data warehouse to conduct rigorous, independent program evaluations across multiple workforce outcomes. Using matched comparisons and pre-post methodologies, we examined the impact of health and wellness programs on musculoskeletal outcomes, cardiometabolic outcomes, as well as group health utilization, disability, and total loss time — moving beyond siloed vendor reporting to a comprehensive view of workforce health impact.

Lori Skewes, Director of Benefits, **Schwan's Shared Services, LLC**

Jennie Wheeler, AVP of Integrated Analytics, **WorkPartners**



Strategies to Address High Cost Claims in Oncology and Hemophilia

1:30 PM – 2:10 PM CT

Cancer and hemophilia represent a disproportionate share of healthcare costs for many employers. In this session, attendees will learn three actionable, evidence-based approaches to leverage claims and population health data, strengthen benefit design, and support high-quality, cost-effective care for affected employees and their families.

Heather Sell – Payer Account Medical Lead, **Pfizer Medical Affairs**



Bridging the Gap: Aligning Employer and Payer Perspectives on Productivity Measurement for Healthcare

1:30 PM – 2:10 PM CT

While employee ill-health imposes substantial economic burdens, the integration of productivity metrics—such as absenteeism, presenteeism, and unpaid labor—into healthcare decision-making remains inconsistent. Current health technology assessments (HTA) often underestimate these impacts, leading to undervaluation of interventions. During this session, we will explore the discordance between employer and payer use of productivity data in drug formulary and benefit design and identify stakeholder-driven priorities for improving the measurement and valuation of lost productivity.

Tommy Majda PharmD, MS, Health Economist, **Genentech**



Thursday, October 1

Concurrent Sessions 2A, 2B, 2C

Redesigning Absence & Leave: A GEICO Case Study in Modern Workforce Support

2:20 PM - 3:00 PM CT

Managing absence, disability, and leave programs has become increasingly complex as employers balance compliance, employee experience, operational efficiency, and evolving workforce expectations. In this session, benefit professionals will hear directly from GEICO on how the organization reimaged and redesigned its Absence and Leave programs to better support employees and business outcomes.

Yasmin Vann - Senior Director Health and Wellness, **GEICO**
Erica Vanni - FVP Benefits Consulting Lead, **ABC/Alliant**



Women at Work: Actionable Strategies to Support Workplace Well-Being

2:20 PM - 3:00 PM CT

Although women make up about 57% of the US workforce, they also spend nearly twice as much time as men caring for children or other household responsibilities. In addition, there are unique health and lifecycle realities impacting women's overall well-being. What impact are these influences having on your organization, and what should you do about it? Presenters will share insights and practical tips to create more holistic support around women's health and well-being for this critical and large segment of the workforce.

Barbara Aloni, Director, Workplace Possibilities, **The Standard**
Debra Villar, Manager Disability Management Resources, **The Standard**



Integrated Data, Smarter Decisions: Honeywell & Truven on KPI-Driven Benefit Management

2:20 PM - 3:00 PM CT

Hear how Honeywell leverages integrated data to drive benefit program management, measurement, and performance. Honeywell will share its high-level strategy and how it has deployed a fully integrated, holistic KPI dashboard to drive decision-making. Truven will share how it supports Honeywell and other employers by integrating health and productivity data into a well-defined, data-driven strategy.



Jenna Andras, Director of Benefits, **Honeywell Technologies**
Tom Sondergeld, Senior Director, Analysis, Research & Solutions, **Truven by Merative**



Refreshment Break 3:00 - 3:20 PM CT

Thursday, October 1

Concurrent Sessions 3A, 3B, 3C

Experienced, Essential, and Exhausted: Women's Health and Productivity in Late Career

3:30 PM – 4:10 PM CT

Late-career women hold disproportionate institutional value - and face a disproportionate collision of health challenges, caregiving load, and burnout risk that most benefit strategies overlook. In this candid panel discussion, three women who have lived that collision share their own stories of navigating menopause, burnout, and health challenges at the height of their careers, and what those experiences revealed about the gaps in how organizations support experienced women. The conversation pairs personal narrative with real-world program results, including outcomes data from Sword's women's pelvic health program, showing what changes, in productivity, engagement, and retention, when employers address these needs directly. Attendees will leave with concrete strategies they can apply immediately.

Candace Jodice, Head of Benefits Strategy, **Sword**
Shannon Lane, Regional Director, **Alight**



Leave as Retention: Designing Leave and Disability Benefits Employees Trust and Use

3:30 PM – 4:10 PM CT

Leave and disability programs are often treated as compliance requirements or cost centers-yet employees experience them as defining moments that shape loyalty. This session reframes leave and disability as part of the talent lifecycle, outlining how to support employees before leave, during absence, and through return. We'll share practical pre-leave planning practices communication, role coverage, benefit navigation, and expectations-setting, plus reintegration strategies that reduce turnover risk, especially in the first 30-90 days back. Metrics and dashboards will demonstrate ROI-post-leave retention, duration, and recurrence trends, experience scores, manager responsiveness, and time-to-full-duty.

Urvashi Saigal, Head of Benefits, **Danone USA**
Brittany Graff, VP, Total Rewards, **Sanford Health**
Chris Tamney, Regional Practice Lead, **Marsh ADL**
Tim O'Connor, Senior Consultant, **Marsh ADL**
Sarah Tarnowski, Senior Consultant, **Marsh ADL**



How One Employer Built a Weight Management Strategy That Meets Employees Where They Are

3:30 PM – 4:10 PM CT

GLP-1 medications are rapidly reshaping obesity care, but many benefit strategies overlook how employees are actually using these drugs, where they work, and where they fall short. This session will explore utilization habits, mindsets, and gaps in obesity care and explain how Baylor Scott and White Health built and implemented an integrated weight management benefit designed to wrap clinical oversight, behavioral science, and personalized support around the employee. Attendees will leave with a framework for building an employer weight management strategy that goes beyond the prescription.

Tina Bogan, VP of Benefits & Wellness, **Baylor Scott & White Health**
Casey Hughes, Director of Behavioral Science, **Baylor Scott & White Health**



Thursday, October 1

Concurrent Sessions 4A, 4B

One Workforce, Five Generations, Growing Leave Complexity

4:20 PM - 5:00 PM CT

Today's workforce spans five generations, and each one is showing up to leave and accommodations with different needs, different comfort levels, and different expectations of their employer. AbsenceSoft's 2026 data shows that Gen Z employees cite mental health and neurodiversity as their top reasons for both leave and accommodations requests, while Boomers are primarily managing illness, injury recovery, and chronic conditions. Gen X is carrying the heaviest caregiving burden, with caregiving and medical procedures topping their leave reasons simultaneously.

Seth Turner - Founder and Senior Advisor, **AbsenceSoft**



Should I stay or should I go now? A Guide to Navigating Changes in Your Disability and Leave Vendor

4:20 PM - 5:00 PM CT

This panel discussion will focus on enhancing outcomes for employers partnering with outsourced leave of absence (LOA) and ADA vendors, drawing insights from the 2025 WTW Absence, Disability, and Leave Survey. As leave management becomes more complex due to expanding state programs and rising ADA requests, organizations are reassessing their vendor relationships. Featuring WTW, Expedia, New York Life, and Sedgwick, the panel will share practical decision-making strategies for strengthening vendor partnerships, reimplementing services, or transitioning providers. New York Life and Sedgwick will highlight their collaborative solution for managing global leaves and their fit for Expedia.

Kate Derby, West Practice Region Lead, **WTW**

Kym Duncan, Total Rewards Leader, **Expedia**

Joe Guagno, VP of Business Development, **Sedgwick**

Ryan Bruce, Director, Client Solutions, **New York Life**



IBI Forum Reception @ Banger's

6:00 PM - 9:00 PM CT

All IBI Forum attendees are invited to join us at Banger's for an unforgettable offsite reception featuring live music, BBQ, and cold drinks sponsored by Lincoln Financial. It's the perfect setting to continue conversations, strengthen relationships, and experience Austin hospitality at its finest!

Featuring award-winning Texas Sun Music trio

79 Rainey Street
~10 minute walk from Marriott Hotel



Fireside Chat - MeQ x IBI

9:00 AM - 9:15AM CT

In this fireside chat, IBI and meQ leaders explore trends at the mental health and workforce intersection, using data and perspectives. They discuss why Gen Z is reshaping leave, accommodations, and support, and share strategies for employers to address mental health, reduce absences, and foster thriving workplaces.

Jim Huffman, CEO, Integrated Benefits Institute

Sera-Leigh Ghouralal, PhD, Director of Research, Integrated Benefits Institute

Jennifer Limon, SVP, Solution Consulting & Strategic Alliances, MeQ



Avoiding the Hidden Cost of Fragmentation: The Power of Integrated Health Care and Workers Comp

9:20 AM - 10:10 AM CT

Employers often manage workers compensation, health benefits, and disability as separate systems each with its own vendors, data, incentives, and care pathways. While this structure may feel familiar, it frequently creates fragmentation that shows up in delayed recovery, inconsistent employee experiences, higher absence, and avoidable cost. This panel session will spotlight an employer case study that illustrates what it looks like when work-related and nonwork related care are connected under one system of care. The discussion will explore how alignment can reduce friction, improve coordination, and support more effective return to work outcomes.

Lori L. Newhouse, SVP of Clinical Operations, Sedgwick

Martin King, VP, Corporate Risk Management, Kaiser Permanente

Jenny Haykin, Integrated Leaves & Accommodations Program Manager, Puget Sound Energy



Beyond GLP-1s: Building a Sustainable Weight-Loss Strategy Employers Can Actually Manage

10:10 AM - 10:50 AM CT

This session will explore how employers can think beyond medication alone and build a broader strategy around GLP-1 readiness, adherence, lifestyle change, continuation, and off-ramping. The discussion will cover identifying good candidates for GLP-1 therapy, supporting employees while they are on medication, and preventing weight regain when they stop. The employer takeaway: GLP-1s are powerful, but sustainable outcomes require behavior change, metabolic visibility, and long-term support.

Richard Yax, VP of Enterprise Solutions, Signos

Colin Rogers, VP of Healthcare, Signos

Dr. Christine Hale, Chief Medical Officer, Arthur J. Gallagher



Panel Discussion: Pros & Cons of Outsource, Insource and Co-Source of Leave Administration

10:50 AM - 11:30 AM CT

As leave and disability programs grow complex, employers reevaluate leave management to balance compliance, employee experience, efficiency, and cost. Whether outsourced, managed internally, or co-sourced, each has pros and cons. In this panel, experts from FINEOS, Marsh ADL, Sedgwick, and Prudential will share insights on the changing landscape and tradeoffs of each model. Panelists will discuss technology, regulation, scalability, data, and control to help employers choose the best approach for their workforce and goals.

Tim O'Connor, Marsh McLennan, Ally Kambach, Prudential

David Setzkorn, Sedgwick, Allison Morgan, FINEOS



Hotel Information

Austin Marriott Downtown
304 E Cesar Chavez St,
Austin, TX 78701

[Book your accommodations through this link](#)

This room block closes on 9/4/26. All Forum attendees can book at the IBI group rate.

<https://www.ibiweb.org/ibi-health-and-productivity-forum/>

Integrated Benefits Institute

IBI is the leading research and analytics-driven member association focused on employee health, well-being, and productivity. Health and productivity professionals from multiple industries join the not-for-profit IBI community to access independent research, leave and disability benchmarks, analytical tools, data resources, and educational and networking opportunities to strategically invest in the health of their workforces and maximize the productivity and performance of their businesses.

Our members are able to leverage the following:

Research

Stay updated on the latest research and resources to assess the impact of well-being on employee productivity and make informed decisions about workforce health investments.

Data Resources

Benchmark against other companies with access to the nation's largest leave/disability database, leveraging over 8 million claims from over 1,300 industry groups.

Tools

Leverage IBI's proprietary analytical tools to assess the value and impact of your health and productivity strategies.

Networking and Educational Events

Exchange ideas and solutions with IBI's employer and supplier members and connect with employer benefits decision-makers at our nationally recognized annual forum, regional events, and online platforms.

Learn more about our tools, research, and analysis here.

www.ibiweb.org

